



The development of a customer-centric experience management framework within the South African retail industry

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DECLARATION

I hereby declare that the contents of this thesis are my original work and that the sources quoted herein are properly acknowledged and referenced.

DEDICATION

I dedicate this thesis to the South African and international retail industry with the sincere hope that it enlarges and enriches retail and marketing professionals' and practitioners' comprehension of the customer experience philosophy and provides a platform for further value-added research. The practical implementation of the customer-centric experience management framework enhances retail customer experiences and creates a strategic competitive position for those brave enough to apply the framework or refine it and make it purpose fit for their unique retail purposes.

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ABSTRACT

Background: Possibly the biggest challenge to the South African and international retail industry is to create optimum customer experiences to ensure sustainability and a competitive advantage in the marketplace. Sustainable positive customer experience ratings remain an evading outcome for an increasing number of retailers in a dynamic and ever-changing customer expectation environment.

Objective: The fundamental problem deliberated in the study is focussed on the discrepancy between retail customers' expected experiences and the actual experience being provided in a retail store by a service provider. The discrepancy is the leading indicator for poor customer service, low customer experience ratings and high levels of customer switching-to-competitors incidences.

The main objective of the study was to provide an answer to the following question: *Can the discrepancy that exists between customers' retail store experience expectancies and customers' actual in-store retail experience, as depicted in low customer experience ratings, be bridged by the implementation of a pragmatic multifaceted customer-centric experience management framework entrenched in a retail store customer journey?*

Method: The study performed an extensive literature review on the customer experience philosophy, service design practices and the customer journey methodology to define a retail in-store customer-experience management framework continuum. This was anchored in a mixed methods research study with a sequential explanatory design supported by survey research methodologies and structural equation modelling (SEM). First, a quantitative study was conducted among active retail customers to establish the value of the framework in practice by evaluating the applicability, validity, efficacy, and impact of each of the framework's retail service system components' potential effects on customer experience levels. This was followed by a supporting qualitative study with a conclusive research design focussing on content analysis through in-depth interviews. Interviews were held among all levels of retail store management and retail training specialists to corroborate, explain and enhance quantitative study findings and to identify, define and discuss pragmatic retail store tactics to implement and manage the experience management framework.

Results: The quantitative study confirmed the applicability, validity, efficacy, and impact of the study's proposed experience management framework. These findings were corroborated by the qualitative study results and augmented quantitative study findings in suggesting pragmatic retail

store tactics that could be considered to stage, support and manage the twelve key drivers (12Es) of the experience management framework. The qualitative study concluded with a critical success factor roadmap on retail tactics with customer experience impact benefits, supported by extant literature, associated with the successful implementation and management of the experience management framework.

Conclusion: The high level of triangulation in study findings confirmed the generality, accuracy, and simplicity of the customer experience management framework and confirmed that the framework can bridge the divide between customers' retail store experience expectancies and customers' actual in-store retail experience. Closing the divide through the implementation and adherence to the critical success roadmap with its pragmatic retail store tactics entrenched in an in-store customer journey can result in sustainable positive customer experience ratings.

Key Words: Customer experience, service design, customer journey, customer satisfaction, customer patronage, customer engagement, retail stores.

LIST OF ABBREVIATIONS

American Customer Satisfaction Index	ACSI
Analysis of Moment Structures	AMOS
Analysis of Variances	ANOVA
Augmented Reality	AP
Business to Business	B2B
Business to Customer	B2C
Chief Executive Officer	CEO
Communication Service Provider	CSP
Comparison Data	CD
Comparison Fit Index	CFI
Confirmatory Factor Analysis	CFA
Consumer and Services Ombudsman	CGSO
Customer Engagement Value	CEV
Customer Experience	CX
Customer Experience Management	CEM
Customer Influence Value	CIV
Customer Knowledge Value	CKV
Customer Life Cycle Value	CLV
Customer Management	CM
Customer Relationship Management	CRM
Customer to Customer	C2C
Customer-Dominant Logic	C-D LOGIC
Data Comparative	CD
Design, Ambient, Social, Trialability	DAST
Education Resources Information Center	ERIC
European Society for Opinion and Marketing Research	ESOMAR

Experienced Based Design	EBD
Exploratory Factor Analysis	EFA
Factor Analysis	FA
His Majesty	HM
International Organisation for Standardization	ISO
Kaiser-Meyer-Olkin (measure of sampling adequacy)	KMO
Marketing Research Association	MRA
Minimum Average Partial	MAP
Minimum Discrepancy Function by Degrees of Freedom divided	CMIN/DF
Net Promoter Score	NPS
New Service Development	NSD
Protection of Personal Information Act	POPI Act
Principal Axis Factoring	PAF
Principal components Analysis	PCA
Qualitative	Qual
Quantitative	Quant
Real-time Experience Technology	RET
Return on Investment	ROI
Root Mean Square Error of Approximation	RMSEA
Service Development	SD
Service Quality Framework	SERVEQUAL
Service-Dominant Logic	S-D LOGIC
South Africa	SA
South African Marketing Research Association	SAMRA
Statistical Package for Social Sciences	SPSS
Structural Equation Model	SEM
Total Quality Management	TQM
Touchpoint, Content, Quality	TCQ

United Kingdom	UK
United States of America	USA
Virtual Reality	VR
Voice of Management	VOM
Voice of the Customer	VOC

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CHAPTER 1 INTRODUCTION, PROBLEM STATEMENT, OBJECTIVES AND METHOD OF RESEARCH

1.1 INTRODUCTION

In their quest to create value, fuel growth, and, most importantly, increase revenue, economies worldwide turn more and more to the service industry, the tertiary sector of a tri-economy (Helkkula *et al.*, 2017:284; Spohrer & Maglio, 2008:238).

According to Graf and Maas (2008:2) and Payne *et al.* (2017:467), the basis for a sustainable business model in the service industry lies in the understanding of what customers value, the creation of such value and the delivery thereof as optimally as possible (Graf & Maas, 2008:2). Economies quickly realised that in the retail service industry it is not only what you sell, but how it is delivered to customers, which plays a significant role in business successes (Goldstein *et al.*, 2002:124; Teixeira *et al.*, 2019:580).

Endeavours to find sustainable answers to customer requirements on the 'how-of-delivery' led to the emergence of a new economic value, namely the experience economy. Pine and Gilmore (1998:97), who defined this new economy, state that experiences should not be confused with service; it should be defined as a separate economic offering. Customer experience goes beyond a customers' interaction with the seller during a purchase situation.

Being confronted with ever-increasing commoditisation in the retail service industry, companies refocused their attention on the emerging economic offering, customer experience, as the new differentiator in a highly competitive business environment (Maklan *et al.*, 2017:2; Pine & Gilmore, 1998:98). Customers increasingly define value about unique, memorable experiences with the business of their choice, to the extent that consumption of 'experiences' in the retail industry outperforms the consumption of goods and services (Deloitte, 2017:6; Payne *et al.*, 2017:469).

The concept 'customer experience' primarily refers to customers' perceptions, feelings, thoughts, and memories following interactions with an organisation's channels to market (Schmitt, 2011:55). Research shows that memorable experiences are critical for customer retention and new customer attraction (Drucker, 1954:34; Pine & Gilmore, 1998:98; Swaim, 2010:33; Terblanche, 2018:49). These experiences typically stretch beyond the delivery of a singular, once-off sales process, or sales activity (Ding *et al.*, 2010:4; Ertemel *et al.*, 2021:2).

Organisations must acknowledge that regardless of the type of service or product provided, customers always attach value to an experience, whether good, bad, or indifferent (Berry *et al.*, 2002:89; Payne *et al.*, 2017:483). These good, bad, or indifferent experiences can translate into positive or negative customer value assessments, impacting customer reactions or comments about an organisation (Fatma, 2014:35).

Furthermore, research must confirm that experiences are unique, thus they are not the same for all customers. Emotions associated with experiences depend on a customer's interpretation of interactions with an organisation's channel to market its products, services, brand, staff and even the company's appearance (Maklan *et al.*, 2017:3; Pine & Gilmore, 1998:99; Pullman & Gross, 2004:557).

Holbrook and Hirschman (1982:137) and Zomerdijk and Voss (2010:71) argue that a misconception exists among some companies that experiences are only associated with entertainment-, arts-, and leisure-related businesses. The truth is that all encounters with all businesses, irrespective of the type of business, have the potential for emotional engagement or emotional connectivity between customer and service provider (Berry & Carbone, 2007:27; Maklan *et al.*, 2017:3; Voss & Zomerdijk, 2007:102).

1.2 BACKGROUND TO STUDY

Companies are faced continuously with a challenge to improve the experiences of customers to leapfrog competition (Jones & Vancauwenberghe's, 2014:3; Terblanche, 2018:48). The challenge to create a unique and compelling customer experience is especially prevalent in physical retail stores where almost 90% of worldwide retail sales take place (Deloitte, 2018:6).

Retail customers increasingly regard a seamless shopping experience as a non-negotiable imperative for good customer experience ratings (Gummesson, 1995:250). This was also a requirement identified by Baker *et al.* (1992:448) and two decades later echoed by Hahn *et al.* (2012:1). Two decades later, Tomas *et al.* (2023) maintain that the retail industry and its physical retail channels are in dire need to investigate and improve its customer experience ratings.

1.2.1 Customer experience trends

Notwithstanding all the progress in marketing theory on customer service, -satisfaction, -experience, -retention and customer loyalty, companies still ignore the most fundamental truth for sustainable success - business is simply about creating, retaining, and enhancing customer relationships (Boyles, 2022; Sparks, 1992:165). Amidst all the information and intelligence on the

service industry and customer requirements, surveys worldwide repetitively confirm unacceptable low levels of customer service, customer experience and customer satisfaction ratings:

- In South Africa, The South African Consumer Goods and Services Ombudsman's (CGSO) Annual Report (2016/17:8) shows high levels of customer service complaints, with Communication Service Providers (CSPs) at the top of the list. The CGSO Annual report (2020/21:10) shows that complaints returned to pre-Covid levels and that there are year-on-year customer service complaints increase in discounting the Covid period. This trend is confirmed by The Ask Afrika Orange Index 2021: "Customer experience levels decline in the past five years. The decline in customer experience is on both the emotional and service-related components of the experience".
- In the United Kingdom (UK), a 2012 study shows that as much as 67% of UK consumers surveyed believe that services deteriorated or remained the same. Only 3% of UK consumers indicate that services are approved substantially (Chevallier, 2012:1). A later study shows that the UK remains behind the world leader in customer experience – the USA (KPMG Nunwood 2016, Seventh UK Customer Experience Excellence Study). A study conducted by KPMG in 2021 shows that, although customer experience levels in the UK increased from 2017, the latest data of 2021 shows a renewed decline in customer experience ratings.
- Studies focusing on USA customers indicate similar negative trends as in the rest of the world in that almost two in five customers believe that businesses pay less attention to providing good customer service (38% in 2014 vs 32% in 2012 and 26% in 2011) (American Express 2014 Global Customer Service Barometer Study). The percentage of customers who believe businesses increased their focus on providing good customer service declined (29% in 2014 vs 32% in 2012 and 32% in 2011). Follow-up studies by American Express in 2020 indicate that 33% of customers will consider switching companies, and more than 50% of Americans have scrapped a planned purchase or transaction because of bad service.
- This trend continues as Jacques (2022) reports that Forrester's Customer Experience Index 2022 reveals widespread drops in US customer experience quality and significant failures in brands' customer focus. Research published by Netomi on the state of customer service in 2022 reports on the reality of customer support in 2022, indicates the shocking truth of today's customer service landscape and showcases the fact that businesses need

to adapt their processes and invest in additional agent training to ensure customer satisfaction.

- The Harvard Business Review (Tomas *et al.*, 2023) highlights ways to improve customer satisfaction and states that despite all the effort and money poured into CX tools by companies, customer satisfaction continues to decline. According to the American Customer Satisfaction Index (ACSI), the United States is currently at its lowest level in 20 years. Consumer sentiment has also been at its lowest in more than two decades. This negative dynamic in the customer-centric ecosystem creates the challenge of figuring out what is going wrong and what companies can do to fix it.

1.2.2 The switching economy

Research shows that poor customer service, regardless of how it is defined, leads to higher levels of customers switching to competitors (Abhari *et al.*, 2021:1; Scott, 2016:18; Van Nguyen *et al.*, 2022:2). This trend highlights the “Switching Economy” phenomenon. Switching is defined as the potential expenditure shift resulting from customers that switched from one provider to another (“complete switch”) as well as those that will potentially do so as they start to take portions of their spending to new providers (“partial switch”) (Halliwell & Samuel, 2015). Even though companies develop and introduce a wide range of customer strategies, the trend of switching remains unacceptably high (Accenture Tenth Annual Consumer Pulse Research, 2014; Dejosse, 2015).

The switching trend is mostly noticeable among retailers, banks, internet service providers and especially mobile provider industries (CSP’s). Research confirms that up to 76% of South African (SA) consumers switched communication service providers due to poor customer service. Almost 88% of SA respondents said that the CSP’s could have done something different to create a more appealing experience to prevent switching (Accenture’s “Switching Economy” analysis is part of the company’s tenth annual Global Consumer Pulse Research conducted in 2014).

In the quest to find sustainable answers to customers switching to competitors as a vote against unacceptable levels of service, companies increasingly turn their attention to the customer experience philosophy and customer journey methodology as an answer to overcome and counter ‘switching’. Meyer and Schwager (2007:119), confirmed by Lemon and Verhoef (2016:80), acknowledge this tendency but express the opinion that in the absence of the root cause for perceived low service levels, the newfound strategies do not necessarily effectively avoid low customer ratings and ultimately, switching. Van Nguyen *et al.* (2022:1) comment that this uncertainty among retailers creates challenges in retaining customers as little research on customer experience during channel switching exists. This beckons the question: What is the

problem? Why does implementing customer experience strategies, or any other intervention in this regard, not consistently deliver the sought-after results?

1.3 PROBLEM STATEMENT

Marketing literature endeavours to propose an answer to why customer experience interventions by retailers are not as successful as intended. It suggests that the problem lies in the existence of a discrepancy, a disconnect, a substantive gap that exists between a customer's expected customer experience and the experience provided by a service provider (Batat, 2019:144; Goldstein *et al.*, 2002:124; Meyer & Schwager, 2007:119; Nguyen *et al.*, 2022:2; Standish *et al.*, 2023:19).

1.3.1 Preamble to the problem statement

The experience gap becomes apparent in what companies publicly say they do for customers and what manifests when customers interact with companies. Klimek *et al.* (2017:2) entirely blame companies that “use customer-centric words but display non-customer-centric actions”. Batat (2019:144) refers to a resultant “discontinuity” between consumption experiences, the insights amassed from it, as well as the way it affects the “lived experience”. These experiences result in customers switching to competitors cause of service providers over-promise and under-deliver (Scott, 2016:18).

Meyer and Schwager (2007:119) and Siwale *et al.* (2023:45) postulate that the root cause of the perceived gap lies in companies being oblivious to, and do not fully understand, the experience needs, requirements, and expectations of their target markets. Therefore, companies cannot comprehensively deliver sought-after customer experiences. This negatively impacts a sustainable emotional connection between the customer and the company, resulting in customer switching behaviour.

Goldstein *et al.* (2002:124) ascribe the gap problem, or the “Expectation Gap” (PWC, 2018), to the absence of an authentic “service concept” among customer-orientated organisations. The researchers maintain that organisations must “ensure that the service package and service encounter fit the needs of the customer and the service organisation itself. Organisations must focus on the design and delivery of their service concept” (Goldstein *et al.*, 2002:122). This requires a comprehensive understanding of the target market before making any effort to plan, design, organise or deliver a service concept that focuses on customer acquisition, engagement, experience, retention, loyalty, or growth (Kotler, 2020:11; Kotler, 1988:173).

Goldstein *et al.* (2002) and Kotler (2020) agree that the absence of a comprehensively formulated service concept originates from underestimating target market interaction needs, wants and experience expectations. This assumption is reinforced by Otnes *et al.* (2012:368) statement that customer experience theory, its scholars and practitioners tend to be oblivious to the range of interactions customers experience, the key retail elements associated with these interactions and how it differs across interaction experiences. Schindler *et al.* (2021:126) suggest that key elements might even include service blessings (“well wishes”) as they serve to underline the importance of emotions in the retail experience.

1.3.2 Physical retail outlet

A physical retail outlet lends itself perfectly to identifying, dissecting and analysing organisation-customer interactions comprehensively. Also, to systematically re-engineer the range and elements of the interactions and associated experiences of closing the identified gap between customer expectations and experiences (Baker *et al.*, 1992:448; Sapna, 2023). These elements of interaction can have an impact on economic, social and environmental levels. It thus facilitates a focus on all three levels of the triple bottom line, namely, the improvement of customer service, employee satisfaction, and the improvement of the company's financial performance (HM Treasury's Service Transformation Agreement 2007:4).

Baron *et al.* (2001:443) and Terblanche (2018:49) share Baker *et al.* (2002:122) sentiments and indicate that retail space is an ideal and fertile environment for employee initiatives and creativity as it aids thought-through and engineered customer journey experiences. Research by Vukadin *et al.* (2016:944) and Yuen and Chan (2010:223) identified additional retail store opportunities, such as artistic elements, personal interaction, ergonomically pleasing environments, and service quality problem-solving. All these elements affect experiences and customer loyalty to the store, store staff and the brand.

However crucial, retailers neglect to engage in the systematic research or systematic engineering of the most opportune stimuli/clues/cues leading to an optimal mix of retail store environmental, behavioural, and social factors that may influence and promote emotional connectiveness, improve((customer experience and store patronage intentions (Baker *et al.*, 1992:445; Baker *et al.*, 2002:120; Francioni *et al.*, 2018:334).

1.3.3 Problem statement

The fundamental problem deliberated in the study is focused on the **discrepancy or gap that exists between a retail customer's expected customer experience and the actual**

experience being provided in a retail store by a service provider. The discrepancy or gap is the leading indicator of poor customer service, low customer experience ratings and high incidences of customers switching to competitors.

The thesis seeks to provide an answer to the following question based on the stated problem:
Can the discrepancy that exists between customers' retail store experience expectancies and customers' actual in-store retail experience, as depicted in low customer experience ratings, be bridged by the implementation of a pragmatic multifaceted customer-centric experience management framework entrenched in a retail store customer journey?

1.4 LITERATURE REVIEW

Research confirmed that retail store environmental factors (layout, staff knowledge and attitude, product variety, displays) have a significant impact on customer perceptions, behaviour, and experience (Francioni *et al.*, 2018:334; Liao *et al.*, 2012:73; Theodoridis & Chatzipanagiotou, 2009:709). However, designing or staging sets of integrated factors or clues within a retail store to evoke mutually beneficial emotional connections between an organisation and its customers is still foreign to most companies (Homefolk & Hulten, 2017:2; Zomerdijs & Voss, 2011:65).

Similarly, most retail companies do not commonly apply operational tools such as service transactional analysis, customer experience analysis, walk-through audits, sequential incident techniques, and customer journey mapping. The application of these tools and techniques could aid in creating a clear understanding of customer requirements and expectations and provide a sound foundation for the design of appropriate retail store customer experience journeys (Johnston & Kong, 2011:6). This neglect explains the disconnect, or gap that exists between what customers require and what companies deliver.

As depicted by Figure 1-1, companies will have difficulty identifying customers' experience expectations and emotional needs without detailed knowledge and understanding of customers. Neither will companies succeed in developing appropriate emotional clues/cues at their point of sale to target customer feelings and reap the benefits of connecting with customer requirements and emotions (Ennis, 2016:153). Nor will they be able to design a customer-centric management framework based on a well-defined retail service system supporting a customer experience journey flow structure (Ding *et al.*, 2010:5).

A sound understanding of customer experience needs and wants should enable retail companies to design and stage a customer-centric management framework focusing on retail store customer

journey flow experiences that not only meet customer expectations but can be measured, analysed, managed, and refined (Csikszentmihalyi, 2000:270; Lemon & Verhoef, 2016:73).

Along with the increased focus on customer experience as a separate economic offering comes the challenge for retailers to create, stage or engineer customer experiences based on confirmed customer expectations and not to leave it to chance (Carbone & Haeckel, 1994:8-19; Lemon & Verhoef, 2016:70) actively and deliberately. This field of study, specifically the role of multi-sensory cues in customer journeys as enabling tools, appears to be in an infancy stage (Homefolk & Hulten, 2017:1; Johnston & Kong, 2011:2).

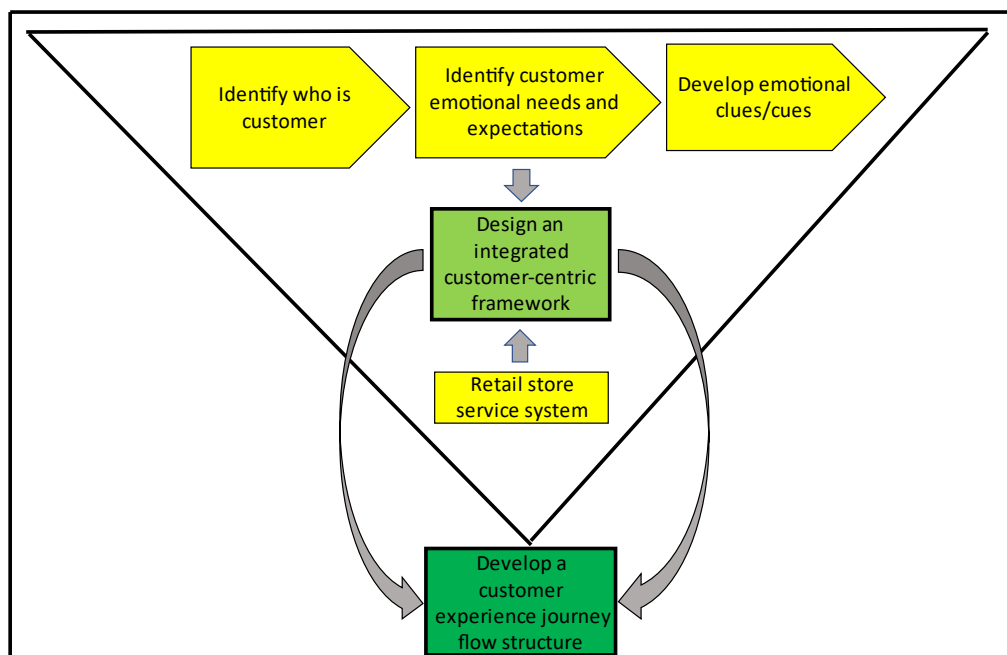


Figure 1-1: Development of a customer experience journey flow structure

Source: Adapted from Ding *et al.* (2010:5); Ennis (2016:153); Johnston & Kong (2011:6); Zomerdiijk & Voss (2011:65)

The challenge thus remains: How do you create, manage, and maintain a distinct customer experience resulting in an emotional engagement that leads to customer re-patronage? (Prokesch, 1995:101). Literature suggests that a possible solution to emotional engagement between customers and retail service providers lies in a customer management framework implemented through an enabling tool for lifetime value creation defined as the ‘customer journey’ (Maynes & Rawson, 2016:3). The journey represents the sum of experiences that customers go through when interacting with an organisation, its channel to market, or its brand (Kolsky, 2016:3).

It is argued that deliberate staging and managing experiences within a customer journey, i.e., blending the experience philosophy with service design practices and the customer journey

methodology, defined as a customer-experience-journey, is an all-inclusive vehicle through which companies can obtain a competitive advantage (Jones & Vancauwenberghe, 2014:3). It is argued further that the tactic of mapping a customer experience journey should be positioned at the core of an organisation's marketing strategies to ensure businesses are built around customers (KPMG Nunwood, March 10, 2015:4). This is all possible within the confines of a retail customer touchpoint, a retail store.

Designing and staging sets of integrated factors or cues, as suggested by Zomerdijk and Voss (2011:65), that can be measured, analysed, managed, and refined (Csikszentmihalyi, 2000:270) can be facilitated through service design practices. Kuehnl *et al.* (2019:551) acknowledge the importance of service design, especially related to customer journey design in consumer markets and "the extent to which consumers perceive multiple brand-owned touchpoints as designed in a thematically cohesive, consistent, and context-sensitive way". Batat and Addis (2021:2395) also emphasise the vital role of service design, while Trischler *et al.* (2017:76) accentuate the value of codesign practices to "leverage full benefits for service design". Rawson *et al.* (2013:2) and Bhattacharjee *et al.* (2016:3) state that successful companies develop end-to-end customer journeys across multiple customer touchpoints. They further suggest that having imperfect customer journeys for single touchpoints will harm end-to-end customer experiences.

The study acknowledges the notions from Kuehnl *et al.*, Rawson *et al.*, and Bhattacharjee *et al.* but postulates that the value customers attach to effectively designed customer journeys across different company touchpoints is as applicable to the design of an end-to-end customer journey within the confines of a particular touchpoint such as a retail store. Hence, the support for Jones and Vancauwenberghe's (2014:3) statement that organisations should identify the key journeys, investigate and align them to customer expectations, reinforce front-line cultures, optimise operational processes and systems and lastly, define and develop metrics and governance systems for continuous improvement of identified journeys (Jones & Vancauwenberghe, 2014:3).

The study identifies the customer's journey through a physical retail outlet or store as a key journey within which to apply the customer experience philosophy, blended with service design practices and customer journey methodologies, and proposes a pragmatic multifaceted customer-centric framework for a retail store experience journey flow, based on customer expectations. This with the ultimate objective of improving customer experience and thus reducing switching (Ding *et al.*, 2010:6). The holistic and pragmatic nature of the conceptual retail service customer experience journey acknowledges and makes provision for customers' cognitive, emotional, social, affective, and physical responses, all critical factors to elicit an emotional engagement (Verhoef *et al.*, 2009:32).

The elements, components or constructs of the conceptual journey are a combination of processes, physical elements, and people skills integrated in such a manner as to portray a deliberate 'planned' or 'designed' customer-centric service continuum (Goldstein *et al.*, 2002:121). The continuum addresses the void expressed by Batat and Addis (2021:2396), Carbone and Haeckel (1994:8-18), Hahn *et al.* (2012:3), Johnston and Kong (2011:2), Pullman and Gross (2004:554) and that experience design does not receive the attention it deserves. It also contributes to the research need for a better understanding of the key drivers influencing customers at different stages of the customer journey (Lemon & Verhoef, 2016:85). It furthermore endeavours to suggest a basis from which a more unified view can be developed counter the confusion among researchers regarding the operationalisation of the customer experience journey concept in retail stores (Chaney *et al.*, 2018:408; Becker & Jaakkola, 2020:630).

A well-defined, structured, and implementable customer-centric management framework, consisting of a customer experience journey based on a tailored in-store retail service flow design, should assist retail stores in understanding what, where, when and how customer flow experiences based on customer expectations should be designed. It is postulated that the successful implementation and management of the conceptual customer-centric framework should lead to higher levels of customer experience, should promote emotional connectiveness with customers and thus, should have a positive impact on customer acquisition, retention, and growth (Voss *et al.*, 2008:247).

1.5 RESEARCH OBJECTIVES AND QUESTIONS

The following primary and secondary objectives are being set for the study.

1.5.1 Primary objective

- The study's primary objective is to propose an integrated customer-centric experience management framework to reduce the discrepancy between retail customers' experience expectancies and customers' actual in-store retail experience, resulting in increased customer experience levels that positively impact customer engagement, satisfaction, and re-patronage.

1.5.2 Secondary objectives

The following secondary objectives are formulated to address the primary objective:

- To conduct an academic literature review to contextualise the customer experience construct. In particular it is important to consider its foundations in marketing theory and

evolutionary development from inter-connecting antecedental marketing concepts from which it originates.

- To recommend a customer flow structure consisting of retail service system components, posturing as store environmental clues, purposefully incorporated into a customer journey design to elicit multi-dimensional experiences (sensorial, emotional, cognitive, pragmatic, lifestyle and relational) that define, conceptualise, and circumscribe the customer experience domain.
- To establish the value in practice, and implicitly, the contribution to marketing theory, of the conceptual experience management framework by evaluating the applicability, validity, efficacy, and impact of each of the conceptual service system components' potential effect on customer experience levels.
- To establish if the impact of the conceptual service system components on customer experience leads to a direct and positive effect on customer engagement, satisfaction, and customer re-patronage.

1.5.3 Research questions

The following primary research question will be answered to achieve the study objectives:

- Does the conceptual customer-centric management framework potentially bridge the discrepancy between retail customers' experience expectancies and customers' actual in-store retail experience and lead to improved customer experience levels that positively impact customer engagement, satisfaction, and re-patronage?

The primary research question is answered by providing context to the following secondary questions:

- What are the foundational roots of the customer experience concept in marketing theory?
- What role does a retail customer journey, based on a service flow design supported by store environmental clues, play in bringing forth multi-dimensional customer experiences?
- Do the conceptual management framework's service system components trigger customer emotions that elicit positive customer experiences?
- Does a positive customer experience directly and positively affect customer engagement, satisfaction, and re-patronage in a retail store?

1.6 SCOPE OF THE STUDY

This section describes the field of study, industry and geographical demarcation.

1.6.1 Field of Study

The study relates to the broader themes of marketing, customer service, customer service systems, customer journeys, customer satisfaction, customer experience, and customer patronage.

The focus is on the narrower concept of customer experience and its application in designing and developing a customer experience journey within a physical retail store. The journey is the instrument or tool to elicit specific sought-after multi-sensory customer experiences during their flow and interaction with service system components (including staff) in a retail store.

1.6.2 Industry Demarcation

The study focuses on the South African retail industry, particularly the South African Communication Sector operating as Communication Service Providers (CSPs) through their respective networks of owned and operated retail stores. Although these entities use several customer touchpoints, including online, home delivery and retail stores, the study only deals with customer experience journeys associated with physical retail stores.

1.6.3 Geographical Demarcation

The research is focused on physical retail store touchpoint customers stretching across all nine South African Provinces, i.e., the Western Cape, Northern Cape, North-West, Free State, Limpopo, Mpumalanga, Gauteng, KwaZulu Natal, and Eastern Cape.

Given the importance of the Gauteng Province as South Africa's and the research company's economic hubs, the study primarily focuses on retail customers situated in the metropolises of the Gauteng Province (Johannesburg and Pretoria). A secondary focus is on retail customers from other provinces.

1.7 RESEARCH PHILOSOPHY

Research philosophy refers to a system of beliefs and assumptions about the development of knowledge" (Saunders *et al.*, 2019:130). It represents "the conceptual lens through which the researcher examines the methodological aspects of his research project to determine the research methods that will be used and how the data will be analysed (Kivunja *et al.*, 2017:26).

From the literature review, the current body of knowledge shows little evidence that marketing practitioners, researchers, advisors, and retailers attempt to anchor customer experience journey learnings into a practical retail service designed customer experience journey. This literature journey follows sensory marketing and behavioural science principles.

The need exists for a comprehensive conceptualisation and integration of store environmental elements, selling techniques and retail store service action constructs. This integration should lead to identifiable, flexible, and manageable retail store service system components entrenched into a customer-centric experience journey continuum.

This is a deductive research study. It starts with a theory, the customer-centric experience journey continuum, developed from marketing research literature combined with retail market observations evaluated through a focused designed research plan (Saunders *et al.*, 2019:152). The study blends three main philosophies: critical realism, pragmatism and interpretivism.

The literature review represents a historical analysis of changes in marketing theory and the development of a customer experience philosophy (critical realism). This is being supplemented by pragmatic ontology, epistemology, and axiology, which aims to improve current retail store practices (pragmatism), leading to a richer, more comprehensive understanding of the multiple socially constructed retail store and retail customer realities (interpretivism). Being a blended philosophical approach to understanding behaviour, not predicting it, a mixed method research methodology, favouring a more pragmatic approach, is preferred (Harrison & Reilly, 2011:8).

1.8 RESEARCH METHODOLOGY

Research methodology, described by Ojo (2009:392) as “a system of explicit rules and procedures in which research is based and against which claims of knowledge are evaluated”, is important to the validity of the study and the reliability of its findings (Dinesh, 2016:51).

The study consists of two phases:

- Phase one consists of a theoretical framework based on a marketing literature review analysing key antecedents, definitions and key determinants of customer experience and the application of the customer journey methodology.
- The theoretical analysis is anchored in a conceptual customer-centric service system design and flow structure. The flow structure intends to evoke multi-sensory experiences as depicted in a conceptual customer-centric management framework for a customer

experience journey in a physical retail store. The proposed conceptual management framework forms the basis for phase two of the study.

- Phase two of the study consists of a two-tier empirical research study aimed at collecting data from active South African retail customers for a quantitative study and retail store managers and training specialists for a supportive qualitative study. The data relates to respondents' and participants' requirements, experiences, opinions, and beliefs about customer-centric management processes and management constructs applied in a retail store that impact a customer's in-store experience. The empirical research aims to more concisely evaluate and confirm the applicability, validity, efficacy and impact of the conceptual management framework's processes, variables and constructs. This is to create an understanding of what the conceptual framework consists of, how it functions in the context of a physical retail store, how it should be operationalised and what impact it would have on retail store customer experiences.

1.8.1 Theoretical framework for understanding customer experience

A theoretical framework derived from marketing literature consists of a review of a cross-section of a comprehensive body of marketing-related scholarships and focuses on definitions, theories, models, and data relevant to the customer experience philosophy. It also focuses on empirical findings of previous research and measuring instruments that have been developed and applied to this field of study (Mouton, 2001:87). The purpose of the literature review is to contextualise the study within existing marketing research on customer experience to assist in providing more clarity on the scope, boundaries, antecedents, and consequents of the philosophy, and to identify opportunities to contribute to the current body of knowledge (Becker & Jaakkola, 2020:630).

This review mostly analyses secondary textual sources such as books, conference proceedings, reference materials (indices and abstracting services), journal articles, unpublished theses and dissertations, newspapers, magazines, and subject-relevant reports. Internet sources through search engines included Google, Yahoo, Web crawler, and Ananzi have also been consulted as secondary sources. This supplemented information from electronic databases such as EbscoHost, Emerald, ERIC, and Academic Search Premier. The latter was used extensively as a primary source of relevant information.

The literature review positions the field of study within the macro marketing, meso customer management, and micro customer experience body of knowledge. It also assists in defining and conceptualising the research topic concerning physical customer touchpoints such as retail

stores. It furthermore enables the identification and application of research design methodologies appropriate to the study. More specifically, the literature review assists in establishing:

- The determinants and characteristics of customer service quality, customer satisfaction and customer experience.
- The cognitive drivers (clues) embedded in customer experiences that enhance customer service within retail store environments.
- The service system components affecting cognitive drivers of flow experiences that impact customer satisfaction and patronage and how it elicits favourable experiences that trigger positive multi-sensory customer emotions and thus heightened customer experiences.
- A detailed insight into existing conceptual and structural models for customer experience enables identifying process features of service system components that affect customer experience.
- The characteristics and role of the customer journey methodology, enriched by service design techniques, as an enabling tool for lifetime value creation for both customer and company alike.
- A conceptual design of an integrated management framework of service system components that elicit multi-sensory flow experiences and, in turn, influence customer experience in a retail store environment.

The literature review would reveal customer needs and wants concerning sought-after retail store experiences. The review also provides more clarity in defining and explaining the customer experience concept.

The ensuing qualitative and quantitative studies further add value by providing new insights into retail customer behaviour and contribute new knowledge to the customer experience journey philosophy and methodology featuring so prominently in marketing and customer behavioural sciences.

1.8.2 Empirical Research

From the literature review, key antecedents are identified, analysed, and positioned within an in-store service system design that forms the basis for the conceptual customer experience journey flow structure. The conceptual management framework, as depicted in Figure 1-5, consisting of

key activity-based constructs and ensuing experience journey continuum, is intended to shape customer perceptions and result in a positive customer experience, leading to customer satisfaction and re-patronage within a retail customer touchpoint.

The proposed conceptual management framework, underpinned by the literature review, forms the focus of data collection, analysis, and application of empirical research methods (Mouton, 2001:148). The research consists of a specific research design, sample design, research and testing instruments, data collection method, and data analysis procedure.

1.8.3 Research Design

The logic of a typical research process, presented in Figure 1-2, shows the different research phases. Having defined the research problem and objectives, the focus shifts to phase 2 of the research process. The research design phase defines the master plan of methods used to sample, collect, and analyse data (Mouton, 2001:55; Shiu *et al.*, 2009:61).

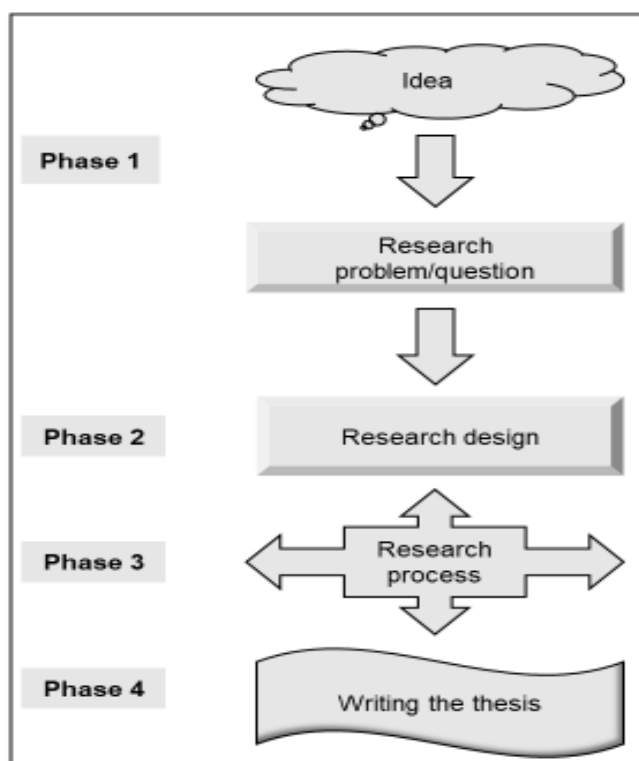


Figure 1-2: The logic of the research process

Source: Adapted from Mouton (2001:47)

1.8.3.1 Mixed methods study

The following research process consisted of a mixed-methods study with an explanatory sequential design.

Johnson *et al.* (2007:123) describe mixed methods research as: “the type of research in which a researcher or team of researchers combines elements of quantitative and qualitative research approaches (e.g., use of quantitative and qualitative viewpoints, data collection, analysis, inference techniques) for the broad purposes of breadth and depth of understanding and corroboration”. A mixed methods approach aims to reap the benefits of complementarity, where the strengths of qualitative research enhance the performance of quantitative research (Morgan, 1998:365).

As the principal phase of empirical research, quantitative data collection and analysis form the study's core. This analysis was followed by a complementary exploratory phase consisting of collecting and analysing qualitative data and building on the results of the quantitative phase (Creswell, 2009:211). The purpose was to triangulate the study findings from the survey data and to generate further understanding of the underlying phenomenon (Jayachandran *et al.*, 2004: 225). This also empowered the researcher to obtain in-depth insights and high construct validity on the research topic (Harrison & Reilly, 2011:15). This research design is deemed suitable and effective for meeting the study's primary and secondary study objectives (Morgan, 1998:366).

An explanatory sequential research design enabled the researcher to evaluate the twelve construct forces that affect customer experience in a retail store (Dinesh, 2016:50). It guided the researcher to not only confirm the applicability, validity, efficacy, and impact of the twelve constructs of the proposed conceptual management framework but also explains the ‘how?’ and ‘why?’ of the framework (Nemaenzheup, 2010:143).

The advantage of applying an explanatory sequential design, as stated by Creswell (2009:211), lies in its simplicity and ease of implementation. Simplicity exists in the design's ambiguously defined and demarcated process stages. However, The researcher is quick to caution that the two phases of the explanatory sequential design imply a prolonged data collection process and time-consuming analysis of two data sets, numeric and text (Creswell, 2009:205).

1.8.3.2 Quantitative study

The quantitative study aimed to quantify, affect measurement, and apply statistical analysis to quantitative data to confirm the conceptual customer experience management framework, establish its value in practice, and contribute to theory (Guetteman *et al.*, 2015:555; Malhotra

et al., 2007:150; Schumacker & Lomax, 2004:5). In particular to assess how “the individual effect of each component should provide novel guidance regarding how experiences could be designed for more favourable service evaluations and increased levels of customer store loyalty (Alan *et al.*, 2016:717).

The quantitative study focused on retail store customers who transacted with a South African retail entity in the twelve months before the study. The research was conducted through a web-based survey questionnaire hosted on an online survey server, enabling Email invitations to the target population of retail customers.

The quantitative questionnaire, in which the respondents self-select their responses, was used to confirm, expand, quantify/qualify, and evaluate the appropriateness of the twelve key system constructs of the conceptual management framework (Malhotra *et al.*, 2007:156). Customers (respondents) were asked to rate statements about the proposed key system constructs and their proficiency in affecting customer behaviour and experiences at the retail shop level (Le Roux, 2011:12).

The questionnaire comprises at least three statements for each of the twelve study constructs. Respondents were requested to select which best describes their opinion about specific statements. The 5-point Likert scale was used to express an opinion where one indicates strongly disagree and five strongly agree with a statement.

A judgemental sampling technique with a 95% confidence level and 0,05% degree of accuracy was used to select a sample from a South African retail customer base of 6 650 customers. A sample of 385 retail customers as per the Cochran Formula was required for the quantitative study.

1.8.3.3 Qualitative study

Malhotra *et al.* (2007:150) define qualitative research as unstructured, exploratory, based on small samples and “...intended to provide depth, insight and understanding”. It provided the opportunity to explore further quantitative findings that provide for a better understanding of the quantitative results (Guetterman *et al.*, 2015:555; Harrison & Reilly, 2011:16; Morgan, 1998:368).

The qualitative study consisted of semi-structured, in-depth interviews with retail store managers and training specialists. This was to determine their opinions on the applicability, validity, and efficacy of the twelve constructs contained in the conceptual management framework. Participants were also requested to suggest, from their own practical experience, retail tactics

that could support the optimal implementation of the twelve constructs in a retail store environment.

Interview guides, consisting of semi-structured questions, were aimed at thirteen judgmentally selected retail store managers and four retail training specialists. Sampling was done based on saturation plus two depending on the data's richness. The selected individuals were responsible for the functional implementation, management, training, and control of their individual retail companies' customer experience philosophy at a retail store level.

The study applied a thematic analysis approach to analyse qualitative data. This approach is not only the most used method of analysis in qualitative research (Chapman *et al.*, 2015:201; Guest *et al.*, 2012:10) but also comply with the aim of qualitative research to capture "the complexities of meaning within a textual data set" (Guest *et al.*, 2012:10). The aim with data analysis is to identify and describe both implicit and explicit ideas within the data through themes and not rely on "counting explicit words or phrases" (Guest *et al.*, 2012:9).

1.8.3.4 Pilot study

Hewson (cited by Fielding *et al.*, 2016:58) cautions researchers against implementing poorly designed studies. Reips and Krantz (2010:196) refer to reliability and validity and the importance of pilot studies and state: "It is crucial for trustworthiness, reliability and validity that researchers avoid this approach, take time to explore the existing available guidelines properly and to pilot procedures as extensively as possible before gathering data within the main phase of a research study".

The quantitative study's online questionnaire and qualitative study's interview guide were pre-tested using a pilot study among four seasoned retail customers and two retail store managers. It was also pre-tested by a staff member of a renowned South African marketing research institution. Respondents were allowed to indicate their understanding of the twelve variables included in the conceptual customer experience management framework. Also, to give an opinion on the influences of the twelve constructs, once implemented, on levels of customer experience and consequently customer satisfaction, engagement, and re-patronage.

Learning points from the pilot studies regarding the process, structure, and content of the questionnaire and interview guide were accounted for, and research instruments were appropriately updated. The retail customer-approved quantitative questionnaire was provided to a marketing research institution to be previewed technically before coding and launch. Minor changes were made before the official launch of the questionnaire.

The pilot study aimed to enhance the quantitative research instrument's reliability, validity, and technical soundness (Martella & Martella, 1999:179). Also, to ensure that the “instrument was designed to measure what it was supposed to measure” (Nemaenzhe, 2010:149). It also ensured a higher reliability and validity of the research instruments (Duong, 2016:9).

The study populations and sampling methodology are summarised in Figures 1-3.

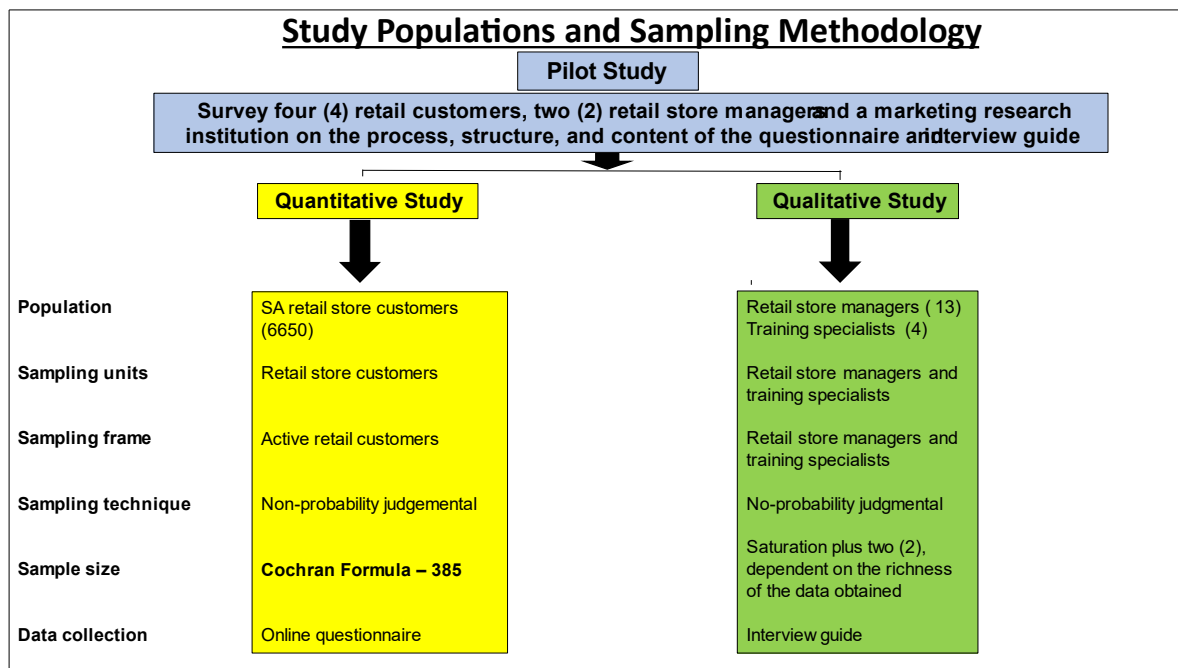


Figure 1-3: Study populations and sampling methodology

1.9 CONCEPTUAL CONTRIBUTION

Baker *et al.* (2002:120) state that store environment research generally lacks a comprehensive examination of key issues related to customer experience, store patronage, and perceived merchandise value. The researchers maintain that although some studies offered conceptual and empirical support for various hypothesised relationships, a void exists because they only focus on selected hypothesised links per study (Baker *et al.*, 2002:122). This statement holds true as observed in related research performed over the past three decades by Zeithaml (1988:4), Bitner (1992:60), Vos and Zomerdijs (2007:11), Verhoef *et al.* (2009:32), Ding *et al.* (2010:8), Fatma (2014:38) and Sheng *et al.* (2016:4).

The conceptual contribution of the study to the field of Marketing stretches over three related areas:

1.9.1 Broadening the customer experience research focus

From the study's literature review, it is evident that customer experience research focuses primarily on the customer experience philosophy, its' constitutes and the role that cues or stimuli play in creating the desired experiences (Baker *et al.*, 1992:445; Baker *et al.*, 2002:120; Zomerdiijk & Voss 2011:65). Lesser studies extend their scopes to show the relationship between customer experience, the application of service design principles, and customer journey methodologies in retail customer journey design (Barari & Furrer, 2018:235; Maynes & Rawson, 2016:3; Jones & Vancauwenberghe, 2014:3). Lemon & Verhoef (2016:85) identified this as a research gap and call for research on linkages between customer experience and customer journeys

The study not only considered the three variables in detail but also showed the potential in a synergistic sequential application in a retail store environment.

1.9.2 The introduction of the trinity of customer experience marketing

The sustainability of improved customer experience levels is at the core of the study's problem statement. The study suggested that a high level of sustainability can be achieved if marketing focuses more on obtaining a dynamic equilibrium (Ozanne *et al.*, 2016:250) as illustrated in Figure 1-4 between customer experience, service design and customer journey (customer experience trinity). The trinity dimensions are not paradoxical and promote the creation of a customer-centric experience management framework with built-in process rigidity (O'Driscoll, 2008:98; HM Treasury's Service Transformation Agreement, 2007:4).

The customer experience trinity suggested an integrated approach intended to contribute to advancing a more practical application of service design in customer journeys. This is to ensure and support higher levels of sustainable customer experiences (Ozanne *et al.*, 2016:249). Intentionally designed customer journeys can impact customer buying behaviour, patronage intentions and loyalty (Abhari *et al.*, 2021:1; Liao *et al.*, 2012:73; Sheng, 2016:4; Theodoridis & Chatzipanagiotou, 2009:709; Yang & Lee, 2022:21). The study proposes and integrated approach which is still foreign to most companies (Johnston & Kong, 2011:2; Zomerdiijk & Voss, 2011:65).

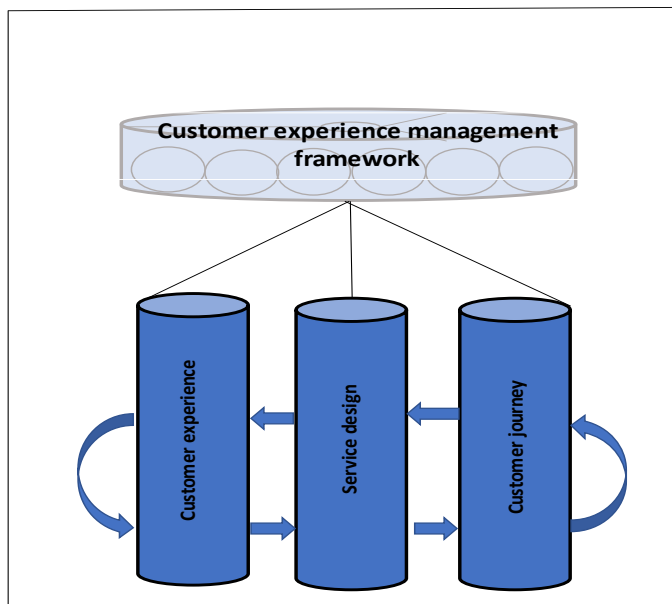


Figure 1-4: The trinity of customer experience marketing

1.9.3 A customer-centric experience management framework

The study proposed a comprehensive conceptual customer-centric management framework for an in-store customer experience journey based on three first-order resource pillars, namely 1) the customer experience philosophy, 2) service design practices, and 3) customer journey methodologies.

The conceptual customer experience management framework, based on the three pillars, as illustrated in Figure 1-4, consists of a high-level sequence of retail store journey constructs applied to the three stages of customer experience (pre-purchase, purchase, post-purchase) as described by Dunn and Davis (2003:35). The framework illustrated in Figure 1-5 proposes a continuum of twelve dynamic retail store constructs, derived from both marketing and environmental psychology disciplines (Baker *et al.*, 1992:448), that form the nucleus of retail management's responsibilities.

The activity-based constructs suggest a pragmatic retail approach anchored in an ergonomically designed retail store layout, a complementary in-store service design, and a customer-focused service ethos (Lemon & Verhoef, 2016:87). It represents practical service process steps supported by retail store tactics, retailers should follow, and customers should embrace to elicit specific experiences and reactions when customers make retail purchase decisions.

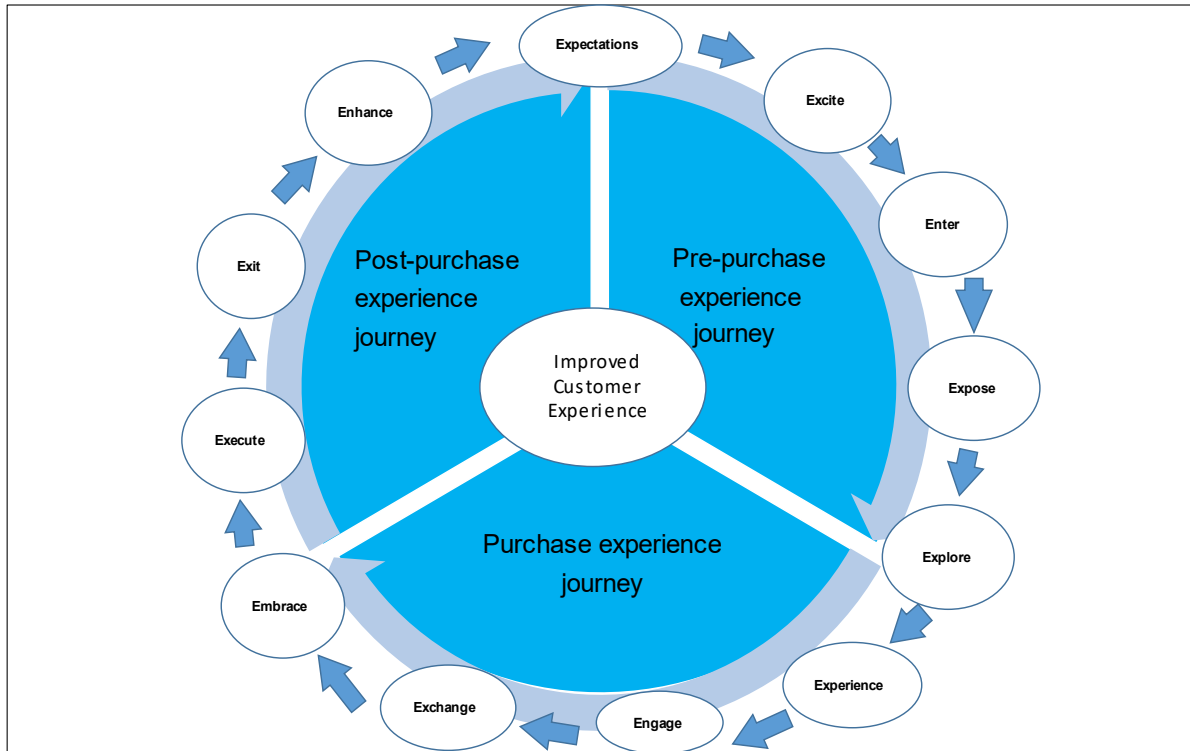


Figure 1-5: Conceptual customer-centric experience management framework

Each action-based construct variable in the conceptual experience journey framework should be supported by practical, executable, action-orientated sub-elements for ease of operationalisation, implementation, and execution. The application of the twelve construct variables can be broadened to more accurately define practical service action steps to make provision for all types of retail entities. It can easily be aligned to fit any retail store and can be controlled and managed by retailers. The conceptual management framework should address the voids identified by Baker *et al.* (2002:121).

1.10 IMPORTANCE AND VALUE OF THE STUDY

The study proposes an answer to Goldstein's "missing link", to bridge the gap "...between what the organisation intends to provide (its strategic intent) and what its customers may require or expect (customer needs)" (Goldstein *et al.*, 2002:124).

The process followed in formulating the conceptual management model was following Goldstein *et al.* (2002) guidelines to deconstruct a service "...into the what and the how or into its components", with the intent to "...identify the various elements of a service concept, check them against customers' needs, and then design and deliver those elements" (Goldstein *et al.*, 2002:124). In applying this methodology, the study endeavours to answer the critical question

posed by Baker *et al.* (2002:120) in a broader sense: how the retail environment ultimately influences a customer's decision to patronise a particular store and to present additional research to understand how the store environment, impacts the customer experience specifically in a retail context (Verhoef *et al.*, 2009:35).

Through a conceptual integration approach, the study attempts to reduce the void in customer experience research where researchers only focus on selected hypothesised links per study and not all links associated with a comprehensive retail patronage model (Baker *et al.*, 2002:122, 134). It also ventures to fill the research gap identified by Lemon and Verhoef (2016:70,85) to strengthen the overall conceptualisation of customer experience and, especially, the customer journey by proposing a comprehensive list of action-orientated customer-organisational behavioural constructs.

Since Kotler (1973:48) highlighted the neglect of deliberate management control and the importance of cues in retail stores as a marketing tool, retail marketing researchers and specialists focused extensively on store environmental attributes and their role in influencing customer behaviour. However, Baker *et al.* (2002:120) called for further research on store environment and atmospherics and articulated the requirement that it includes aspects such as environmental design and layout.

Furthermore, Baker *et al.* (2002:120) maintain that store environment research lacks a critical evaluation of how different store environmental elements or cues influence customer perceptions and experiences. Biswas (2019:112) agrees with the significant role of cues in retail stores and identifies the need for more research on the “unexplored” elements, such as visual imagery. This call focuses on the effects of sequential sensory cues (Biswas *et al.*, 2021:746) as proposed by the study's conceptual model.

Mohan *et al.* (2013:1725) and Seock (2009:331) mentioned the impact store environments or atmospherics have on customer patronage. Research conducted by Liao *et al.* (2012:73) specifically showed that store environmental cues play a meaningful role in store profit and the perceived value a retail store offers. It thus also stands to reason that if store environments have the potential to affect sales, they also have the potential to significantly impact customer satisfaction, store development and growth (Demirgünes, 2014:57; Turley & Milliman, 2000:209; Yang & Lee, 2022:12).

Retail-orientated research on the customer experience philosophy focuses mostly on selected environmental and atmospheric elements and limited general constructs, such as the physical attractiveness of a store and how it affects store patronage intentions (Harris *et al.*, 2003:186).

Although evidence exists that physical store environments trigger affective reactions in customers, it does not adequately extend beyond experience-orientated vocabulary and the generation of ideas (Mohan *et al.*, 2013:1712; Mower *et al.*, 2012:443). Little evidence exists that retailers and their advisors attempted to anchor the vocabulary and the use of experience metaphors in a practical, implementable experience continuum. A sequential experience continuum is practically applied through a service-designed customer journey based on sensory marketing and behavioural science principles and constructs (Biswas *et al.*, 2021:746).

In considering the literature, it is noticeable that much compartmentalisation exists in research on customer experience, customer journey mapping and service design. In some instances, these philosophies and methodologies are seen as opposing and not complementary (Scott, 2016:17). However, conceptualised integration is required. Schmitt (2011:70) refers to the conceptualisation of experiences along various experience dimensions. The experience dimensions should include “sensory-affective, cognitive-intellectual, and behaviour and action-oriented components. Moreover, because experiences are evoked by environmental cues, social and relational elements are also important aspects of experiences. From a research perspective, it is critical to examine the impact of experiences not only in the aggregate but additionally, experiences dimensions must be examined in terms of how they relate to certain outcome variables “ (Schmitt, 2011:71).

The study’s primary objective is to present a framework for the comprehensive conceptualisation of an integrated process of multi-sensory action-orientated constructs to address the gap between retail customers’ experience expectancies and customers’ actual in-store retail experience. Theorising and empirically investigating store environmental elements, selling techniques and retail action constructs resulted in the identification of flexible, manageable retail service system components. These components are sequenced into a customer-centric experience journey continuum that has the potential to positively influence customer experience within a brick-and-mortar retail store. It serves as a platform for a much-needed operational strategy for physical store-based retailers in the competitive world of retailing (Duong, 2016:3).

1.11 ETHICAL CONSIDERATIONS

The study complies with the research ethics guidelines of the NWU originating from ethical principles articulated in the Belmont Report of 1979 (Kruger *et al.*, 2014:2). The latter provides a framework for researchers to follow ethical standards and proper procedures to protect research participants.

The study adheres to the three Belmont ethical principles of (a) autonomy, which requires participants' informed consent to participate in the research study; (b) beneficence, relating to the minimising of potential risks to participants; and the principle of (c) justice, which refers to fair procedures and outcomes in the selection of research subjects (Zucker, 2014:2). It was evaluated both scientifically and ethically by the appropriate faculty research proposal and research ethics committees. The ethical risk level associated with the research was assessed, and ethical clearance was obtained based on a minimum risk level.

A research participant informed consent element was included in the introductory sections of the questionnaires for customers, store managers, and store owners, as well as in structured interview documents for research company corporate staff. The informed consent element explains the purpose of the study, possible benefits to participants and the retail industry, the process followed for performing the study and the voluntary nature of the proposed study (Zucker, 2014:3). The consent also addresses participant anonymity and confidentiality associated with participation in the research study (Kruger *et al.*, 2014:128).

1.12 CHAPTER OUTLINE

The chapter outline of the study is depicted in Figure 1-6.

Chapter 1 (Current chapter)

This chapter introduces and orientates the study. This includes the background to the study, problem statement, literature review, research objectives and research questions, the scope of the study, research philosophy and methodology, conceptual contribution, importance, ethical consideration of the study, and the chapter outline.

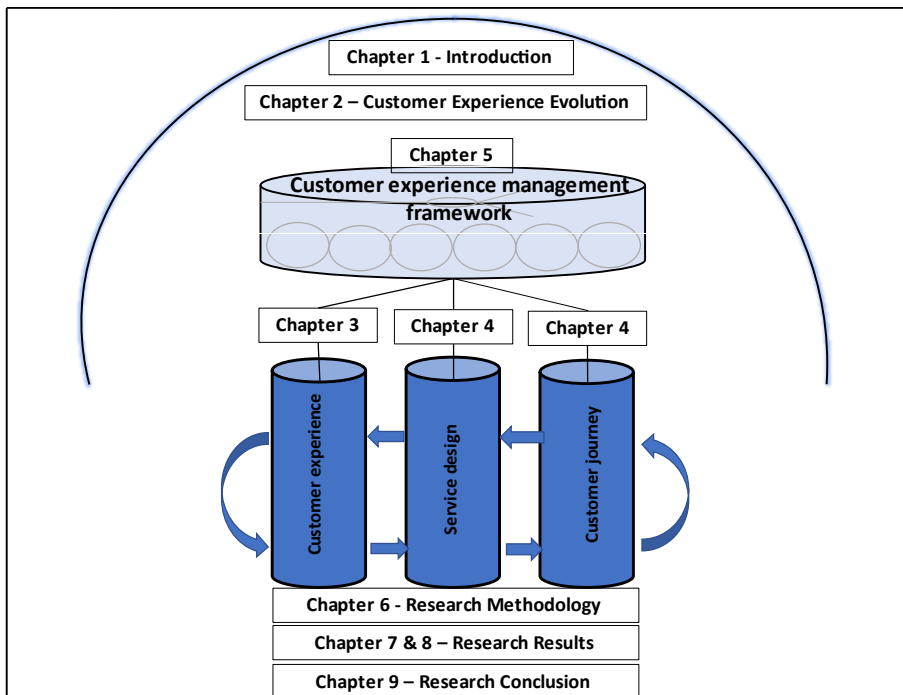


Figure 1-6: Chapter outline

Chapter 2 The evolution of customer experience management

Chapter 2 reviews the relevant literature on the evolutionary development of the customer experience construct since the 1950s. The analyses serve as an important basis for understanding the roots of the construct. It also laid the foundation to further explore, in more detail, the experience construct still shrouded in a cloud of debate and uncertainty.

Chapter 3 An analysis of the customer experience philosophy

This chapter focuses on the customer experience philosophy as the first of three first-order resource pillars of the marketing trinity that represents one of the foundational roots of the conceptual customer-centric experience management framework. It focuses on experience in non-management, management, and marketing sciences, highlighting the conceptual domain of customer experience and its position in the customer experience ecosystem. It defines and discusses customer experience, examines the variety of customer experience definitions, and concludes with a proposed integrative representative and all-encompassing customer experience definition that supports the holistic nature of the construct as reflected in research studies.

Chapter 4 Service design and customer journeys

This chapter focuses on the remaining two first-order foundational resource pillars of the marketing trinity that support the conceptual experience management framework. The application of service design and customer journey methodologies, principles, tools, and techniques in

pursuing optimal customer experiences could contribute to obtaining a better understanding of customer requirements and expectations and provide a foundation for proposing an appropriate retail store customer-centric experience management framework.

Chapter 5 A customer-centric experience management framework

This chapter builds on the preceding three chapters that identified and described the foundational elements of the marketing trinity and illustrates how the marketing trinity culminates into and supports the conceptual experience management framework. It defines and describes the twelve activity-based constructs in the conceptual customer-centric experience management framework anchored in an ergonomically designed retail store layout, a complementary in-store service design, and a customer-focused service ethos.

Chapter 6

This chapter provides a background to the research undertaken by referring to the reason for the research, the research philosophy, the problem, the questions, and the research objectives. It discusses in detail the research methodology and the research design followed to address the research problem, provide answers to the research questions, and execute the study's research objectives.

Chapter 7

This chapter provides the results of the quantitative phase of the study's sequential explanatory mixed-method study. It focussed on the study's results among a sample of active retail customers to evaluate the applicability, validity, efficacy, and impact of twelve key customer experience constructs associated with a customer's journey through a South African retail store.

Chapter 8

This chapter discusses the results of the secondary phase of the sequential explanatory mixed-method study, the qualitative study. The qualitative study surveyed the views of retail store management regarding the conceptual experience management framework. This is to assist in explaining, enhancing, and corroborating initial data obtained from the quantitative study and to address the "how" of the framework more comprehensively.

Chapter 9

This chapter comprises a discussion of the quantitative and qualitative research findings linking the research frameworks and findings, the research propositions, and the study's objectives.-It

provides a summary of research questions and findings, recommendations, the contribution and limitations of the study and recommendations for future research.

1.13 CONCLUSION

Customer service surveys globally confirm unacceptable low levels of customer service, - experience, - satisfaction and customer re-patronage. Customer survey results suggest that the root of the problem lies in the disconnect between a desirable customer experience and the real experience being delivered to customers by the service provider. This disconnect leads to a phenomenon of 'switching': customers voting with their feet and moving their purchasing power to competitors.

Within most industries, customers feel that experiences can radically improve. The retail industry, in particular, experiences and faces serious "switching" tendencies. Marketing literature points to the need for a customer experience philosophy entrenched in a customer journey methodology enriched by service design principles to solve poor customer experience and create a sustainable competitive advantage in the retail industry.

The study supports the application of customer experience journeys; however, it should be anchored in a continuum of fundamental but basic, action-orientated elements of service offerings. To this end, a pragmatic customer-centric management framework for a customer experience journey flow is conceptualised for retail stores. The conceptualised continuum, developed as an integrated process of multi-sensory action-orientated constructs, should promote more fulfilling, hedonistic experiences among retail customers.

CHAPTER 2 THE EVOLUTION OF CUSTOMER EXPERIENCE MANAGEMENT

2.1 INTRODUCTION

Possibly one of the most profound foundational statements in marketing management theory was made by Drucker (1954:34) when he stated that the only purpose of any business is to create a customer. A customer is defined by the Oxford Dictionary (1964:301) as an entity or person who buys goods and services from an organisation. The same source defines servicing such a customer as “the assistance and advice provided to those people who buy or use its products and services”. Both definitions are being regarded as too narrow by Holbrook (1999:9) in light of the exponential strides made in ever-changing customer- and marketing sciences and strategies.

However, the core of Drucker’s 1954 the-reason-for-existence-of-an-organisation-statement remains true, even today amidst enormous changes in the service and marketing arena. These changes include digitalisation, launching new technologies, constantly shifting priorities and customer expectations, introducing multiple touch points, and progressive changes in channels and media. Kotler (1988:134) refers to the ever-changing environment as the “Age of Discontinuity”. Even in the age of “discontinuity”, one constant remains - year after year, surveys among Chief Executive Officers confirm that ‘customers’ still have the most significant impact on business strategies (Collins *et al.*, 2022; Price, Waterhouse & Coopers’ 19th Annual Global CEO Survey 2016:13).

Boyarsky *et al.* (2016:1), elaborating on the Drucker statement, claim that being in the business of creating customers only is, however, not sufficient. To ensure business success, organisations must retain customers. One way of ensuring customer retention is to find the answer to a fundamental question posed by Drucker: “What is value to the customer?” (Drucker, 1986:62). Having the answer to this question does not only assist in attracting (creating) a customer but also leads to engagement, satisfaction, loyalty and ultimately, customer retention. So important is finding an answer to the value question that some researchers postulate that the pinnacle point of hierarchical marketing sophistication, as illustrated in Figure 2-1, should be value-based marketing (Venter & Jansen van Rensburg, 2014:14).

In supporting this notion, Gupta *et al.* (2004:7-18) suggest that organisational objectives should shift from the creation of value for the business through customers towards the creation of value for customers (Kumar & Reinartz, 2016:36-38; Zeithaml, 1988:2).

Researchers such as Sánchez-Fernández *et al.* (2009:93) and Terblanche (2018:48) suggest that customers constantly demand value, even sought-after value, such as a pleasant in-store shopping experience. However, the challenge remains that organisations often struggle to identify customer needs, what customers value, what role customer experience plays in creating value, and how to give rise to the expected value needs (Maynes & Rawson 2016:1).

The renewed quest to identify and create value for customers gave impetus and focus to a new management objective – understanding the customer and the creation of a strong and sustainable customer experience (Accenture 2015; Lemon & Verhoef, 2016:69; Verhoef *et al.*, 2009:31).

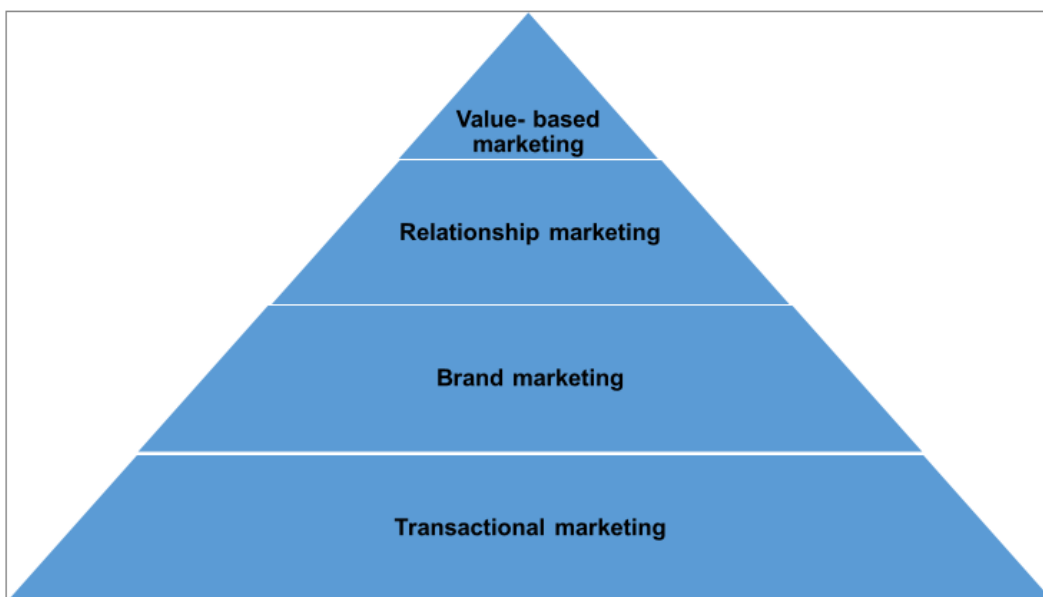


Figure 2-1: The evolution of marketing

Source: Venter & Jansen van Rensburg (2014:14)

2.2 RESEARCHING CUSTOMER EXPERIENCE

The ‘experience’ concept is not new and has been addressed by several disciplines outside of Marketing, including Philosophy, Psychology and Sociology (Cura & Cova, 2003:269; De Keyser, 2015:21; Sirapracha & Tocquer, 2012:112). Research from Fatma (2014:33) and Hoffman and Bateson (2010:8) contend that the customer experience philosophy developed from retail marketing science, specifically retail customer management. In support of this notion, Lemon and Verhoef (2016:70) state that the ‘experience’ concept evolves from research themes such as “services marketing, customer satisfaction, service quality, relationship marketing, customer relationship management, customer centricity and customer engagement”.

2.2.1 Customer experience debate

It is clear from global research priorities, as identified by The Marketing Science Institute (2018:2), that customer experience will remain a contentious item on marketing research agendas for many years to come. The reason for this might be found in a statement by Johnston and Kong (2011:2) that the topic of customer experience is still in the infancy stage of development. Malthouse and Calder (2011:277) support this statement and add that literature on customer engagement and customer experience remains controversial. It can be argued that the controversy surrounding customer experience might stem from the neglect or shortcomings in researching the behavioural aspects thereof, and in particular, the relationship between buyer and seller (Dwyer *et al.*, 1987:11). It might even stem from research that has shown that no clear definition or typology for customer experience exists (Klaus *et al.*, 2012:1). Some researchers even perceive the need for ongoing research as a race to gain proprietary rights on the concept of customer experience (Hyken, 2018:1).

Research literature frequently calls for more clarity regarding what customer experience in practice represents. How and where does it fit into marketing and organisational management? Divergent interpretations persist regarding the position of customer experience and how it should be applied in organisations. Ahmed *et al.* (2016:50) position Customer Experience Management (CEM) as a customer interaction approach. These researchers link the customer experience concept to the family of so-called “customer quality improvement approaches” that include not only Customer Relationship Management (CRM), but also Total Quality Management (TQM) and Service Quality Frameworks (SERVQUAL).

Another opinion in the literature labels customer experience as a “positioning concept” through which companies can gain a competitive advantage (Venter & Jansen van Rensburg, 2014:152). The researchers identify the experiential concept as one of three positioning concepts available to organisations (the others being functional and symbolic positioning). They furthermore suggest that the experiential concept be related to the positioning of products, specifically to the unique experience products provide customers (Venter & Jansen van Rensburg, 2014:153).

2.2.2 Customer experience myopia

Venter and Jansen van Rensburg’s narrow focus on product experience fails to appreciate the need for a more holistic approach to customer experience. Their approach is characteristic of the so-called “myopia marketing” or marketing short-sightedness. (Levitt defined marketing myopia in 1960 (Grant, 1999:397-406)). Grant explains that Levitt emphasises humanity and, specifically, human wants and needs in marketing, not only the narrow singularity focus on product,

technology, or organisational needs. The focus on a broader wants-and-needs approach closely resembles the renowned psychologist Abraham Maslow's hierarchal needs theory, where human needs are in ascending order of significance, culminating into a level of "self-actualisation" (Grant, 1999:400).

Considering customer experience from a broader want-and-needs perspective compels Laughlin *et al.* (1994:5) to add another dimension to the debate. With their theoretical model, they also incorporate societal wants and needs to ensure sustainability through needs satisfaction (Figure 2.2). They, in effect, redefine Levitt's critique concerning organisational short-sightedness for not including human needs and state that the exclusion of societal needs leads to "marketing presbyopia". These researchers suggest that companies consider the impact of their marketing activities on broader societal experiences. This viewpoint is supported by Smit *et al.* (2010:4), who define societal neglect as the "new marketing myopia"; marketers fail to see the broader societal experiential context of business decision-making.

Laughlin *et al.* (1994:5) suggest a remedy for organisations to correct "marketing presbyopia", and, by implication, also "new marketing myopia" by introducing a "trifocals" approach (Figure 2-2). They further state that customer satisfaction is not the sole key to success, and organisations must redefine their own needs in terms of customer and societal wants and needs. Khan *et al.* (2020:4) and Standish *et al.* (2023:24) supported these sentiments.

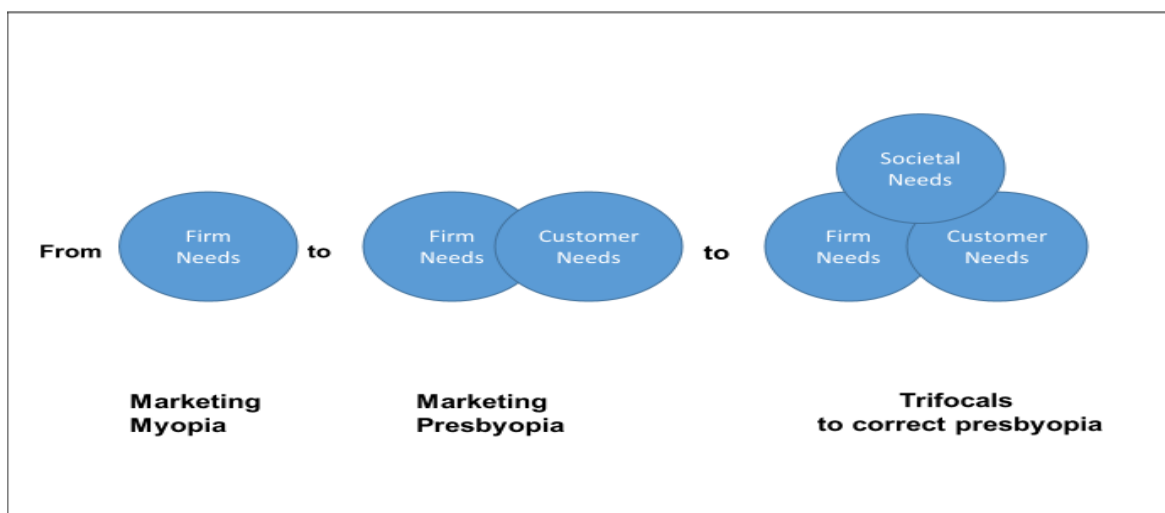


Figure 2-2: Organisational need focuses

Source: Adapted from Laughlin *et al.* (1994:5)

Considering the above perspectives from different researchers, it becomes clear why words like "contradictory" and "infancy" are being used when referring to the study of customer experience

(Malthouse & Calder, 2011:277). The spectrum within which customer experience is identified, defined, and positioned varies from a narrow organisational need's orientation to a broader customer orientation, to a much wider societal orientation.

To complicate matters further - literature uses a variety of adjectives interchangeably to describe the customer experience noun. Some authors define it as a concept, a construct, a discipline, a philosophy, or an approach, while others regard it simply as an emerging idea (Palmer, 2010:196). There is even a debate that the properties of customer experience depend on whether 'experience' is regarded as a noun versus 'experience' as a verb (Palmer, 2010:197; Vandermerwe, 1993:50).

It is essential to investigate and interrogate the precursors to customer experience in-depth. Not only to unearth the roots of customer experience but also to enable and aid a more comprehensive understanding of the construct. Such an understanding should empower marketing professionals and practitioners to apply it effectively in business.

2.3 THE CUSTOMER EXPERIENCE EVOLUTION

The myriad of different approaches to and perspectives on customer experience, with which researchers are confronted, evokes an environment that equates to the 'Frye Phenomena'. Northrop Frye, as cited by MacDonald (1979), preferred complex, confusing situations to the experience of a twilight train trip - "As one's eyes are passively pulled along a rapidly moving landscape, it turns darker, and one begins to realise that many of the objects that appear to be outside are actually reflections of what is in the carriage. As it becomes dark, one enters a narcissistic world, where except for a few lights here and there, we can see only the reflection of where we are." (MacDonald, 1979).

Endeavours to identify the roots of customer experience and how the construct evolved should acknowledge the possibility of the Frye Phenomena, or tunnel vision, but should not be discouraged. Researchers should also not be disheartened by multiple customer experience concepts within marketing and consumer behaviour literature. As Kotler and Levy (1969a:55) pointed out: "the scope, methods, and aims of any discipline are more determined by tradition than by anything intrinsic in the name. Secondly, every discipline periodically faces challenges to its traditional form from people within and outside who seek to make it more relevant."

It is important to recognise and understand the antecedent marketing concepts from which it originated to obtain a fundamentally sound grasp on the customer experience construct (Lemon & Verhoef, 2016:70). Not only to show the scarlet thread within the inter-connecting antecedents

but also to understand the foundations and evolutionary development of what is referred to by some researchers as the 'customer experience philosophy' (Malthouse & Calder, 2011:277).

It is also important from the literature review that customer experience is not to be confused with other customer-focussed constructs (Lemon & Verhoef, 2016:74). A cryptical but concise historical view on the evolutionary development of the customer experience philosophy can be seen in Figure 2-3 (Drotskie, 2009:110; Lemon & Verhoef, 2016:75). Customer experience, as per Figure 2-3, evolved from multiple concepts, each leaving a remnant in the customer experience philosophy as it stands today.

Lemon and Verhoef accredited seminal researchers such as Kotler, Howard and Sheth, for the foundations laid on customer experience in the late 1960s. Other researchers maintain that the concept of customer experience emerged when Holbrook and Hirschman published an article on "experiential aspects of consumption" in 1982 (Fatma, 2014:33; Kranzbühler *et al.*, 2018:434; Sirapracha & Tocquer, 2012:112). Johnston and Kong (2011:2) regard Pine and Gilmore as the pioneers who gave substance to customer experience through their 1998 paper: "Welcome to the Experience Economy".

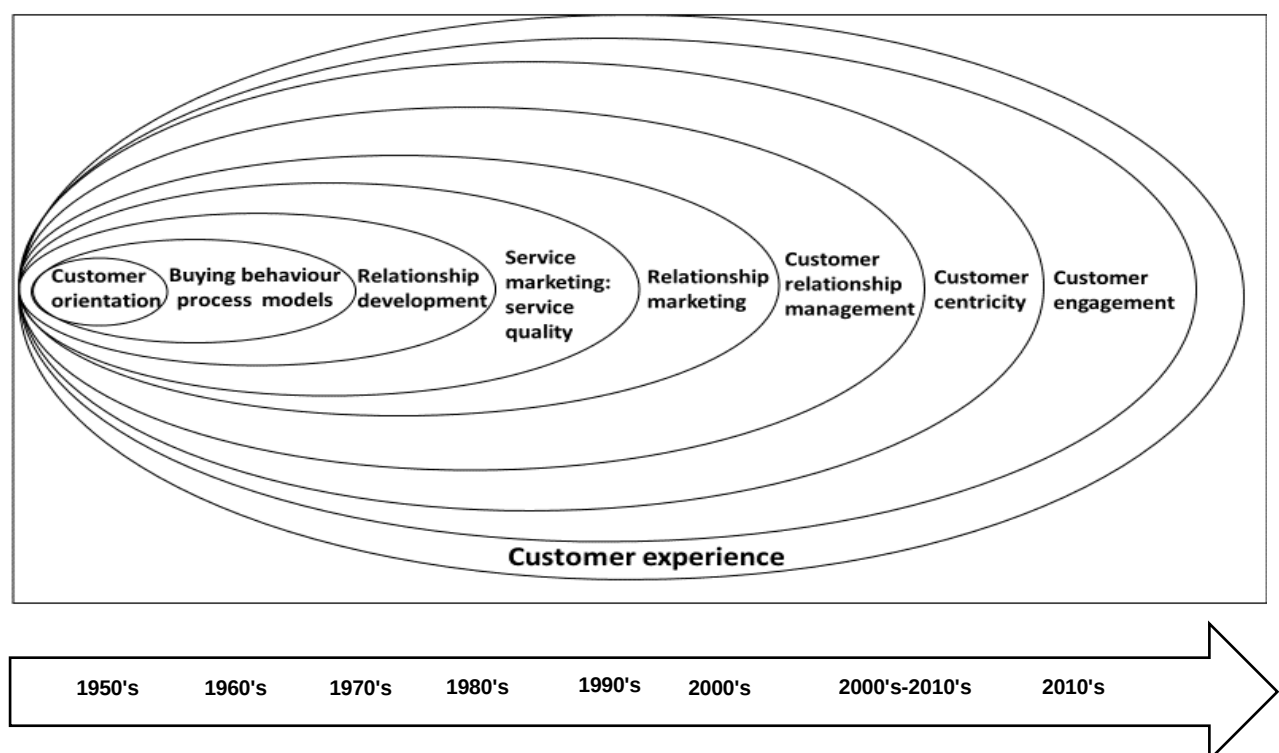


Figure 2-3: The evolution of customer experience

Source: Adapted from Drotskie (2009:110) & Lemon & Verhoef (2016:75)

This study, however, postulates, as illustrated in Figure 2.3, that, in researching the roots of customer experience, not enough credit has been given to the work done by Abbott and others in the 1950s. As early as 1955, Abbott stated that customers desire “satisfying experiences” and not products (Abbot, 1955:40).

2.4 KEY CUSTOMER EXPERIENCE ANTECEDENTS

An acknowledgement and understanding of the foundations of customer experience and an appreciation of contributions from related research areas are central to defining the concept not as merely conceptual but as a real emerging source of competitive advantage. A fundamental grasp of the evolutionary development of this widely used and sometimes abused concept should ensure that it is not summarily dismissed because of the arguable way it has been applied but is recognised as an important cornerstone in marketing science development (Palmer, 2010:196).

2.4.1 Customer orientation – 1950s

Literature on the evolution of ‘customer experience’ accredits different dates and different researchers to the origin of the customer experience philosophy. But it was Drucker (1954:34) who, in the 1950s placed the ‘customer’ at the centre stage of an organisation’s reason for existence. His statement ushers in an era this study defines as ‘customer orientation’. An era where the ‘customer’ became the new focal point in business management and marketing theory.

Levitt (1960:56) acknowledges the new focal point and declares that organisations are not in the business of selling products or services but are in the business of “buying customers”. Satisfying customers’ needs and wants should be the most important focus of any organisation to ensure business success. With this objective as a cornerstone of any business, Kotler, and Levy (1969b:10), declare organisational marketing as a “societal activity” that goes beyond simply selling tangible objects. In the manufacturing-dominated economy of the 1950s, organisations believed that the needs and wants of customers exclusively revolved around tangible products and their qualities (Ansoff, 1957:114; Christopher, cited by Palmer, 2010:197). Little to no attention had been given to customers’ needs and wants in a broader context. The researcher’s statement that “customers have several missions” suggests that their lives revolve not only around tangible products and their qualities but also around a multilevel needs-and-wants requirement that organisations should endeavour to satisfy.

2.4.1.1 Concept of value-add

Abbott (1955:39) was one of the earlier researchers who postulated that customers do not have simplistic demands. He argues that customer demand does not necessarily lie in the product per

se but in the product as a means to something else. Beckman (1957:7) introduces the concept “value added,” which might be an apt description or explanation for what is meant by the “something-else” customer requirement. Beckman became a strong proponent for the wide application of the value-added concept as a measurement of output in all business functions and processes (Beckman, 1957:9).

Research by Srivastava *et al.* (1999:168-179) places customer value creation within the centre of the customer experience domain. Within the context of “something else”, Morris (cited by Holbrook 1999:9) contends, as far back as 1941, that “all products provide services in their capacity to create need- or want-satisfying experiences”. Rosenborough and Riesman contended in 1955 that these aspirational experiences relate to belonging and creating meaning in customers' lives (cited by Liverant, 2018:192, cited by Schrage, 2012:188). This same notion was expressed by Abbott (1955:40) when stating: “People want products because they want the experience-bringing services which they hope the products will render”.

Back in 1964, the Oxford Dictionary (1964:426) referred to “experience” as “feelings, pleasure, and treatment”, but also included “an event or occurrence that leaves an impression”. All concepts are closely related and associated with human behaviour, forming part of social sciences. To understand human conduct, one must thus gain an understanding of human behaviour (McDougall, 2003:364). When Abbott states that people’s basic wants include experiences of all sorts, he touches explicitly on people’s “drives” and “urges”. This suggests that the ‘experience-wants’ are psychological and, by implication, behavioural; it thus relates to the social sciences (Abbott 1955:39). Is it then a coincidence that the behavioural revolution came into being in the 1950s, the same time as the spotlight fell on experience-wants-and-needs (Miller 2003:141)?

2.4.1.2 Hedonistic psychology and behavioural sciences

With the customer experience movement in its embryonic stage in the 1950s, there were already side remarks about the applicability of hedonistic psychology in human behaviour. Abbott (1955:39), however, was quick to indicate that his statements about basic wants have no relation to the discredited hedonistic psychology movement. This type of betrayal against developing social science doctrines continued through the 1950s and peaked in the 1960s and 1970s (Ross 1993:99). Brody (1966:295-305) refers to this period as a period of tension between the method of behaviourism and phenomenology. Only for this indifference towards the social sciences to be reversed much later in the customer experience evolution and started to play a prominent role in developing the customer experience philosophy.

The seed for what is regarded as the “new” competitive differentiator in marketing and business management, the customer experience philosophy, was sown in the 1950s with the dawn of the customer focus and the start of the behavioural science revolution. As indicated earlier, it predominantly originated from the works of Morris, Drucker, and Abbott with foundational cornerstones in behaviour and social sciences, multilevel psychological needs-and-wants, value adds, and hedonistic requirements paving the way for the customer buying behaviour era of the 1960s.

2.4.2 Customer buying behaviour – 1960s

The marketing function in the 1960s was executed predominantly as a narrowly defined natural business activity. Its primary focus is finding, promoting, and stimulating product sales as a primary driver of companies' outputs. Little attention was given to satisfying customer needs, creating customer loyalty, or even querying customers' decision processes when purchasing.

2.4.2.1 Customer satisfaction engineering

Kotler and Levy (1969b:10) questioned the narrow view on marketing and suggested broadening the marketing concept towards customer satisfaction engineering. These researchers claim that customers do not purchase a product without a social purpose (Kotler & Levy, 1969b:15). This perspective is supported by Levitt (1960:53) by citing an example of fuel purchase. Customers do not buy fuel because it is regarded as a satisfying experience. They also do not taste, drink, or evaluate the fuel. Customers buy the commodity as a means to an end - the need to remain mobile. They dislike the inconvenience of buying it. It is thus not only the tangible product, fuel, which is important to the customer, but more so the commodity's intrinsic value, mobility, that appeals to them. Hence, Levitt (1960:55) pleads that business processes and deliverables should also be regarded from a customer's intrinsic value perspective.

Organisations should be in the business of creating, arousing, and satisfying customer needs. In the same context, Gummesson (1995:250) argues that customers buy offerings, not goods or services, and calls for businesses to adopt a customer utilisation perspective.

2.4.2.2 Buying behaviour model

Lemon and Verhoef (2016:71) believe that Howard and Sheth's flow model on buying behaviour of the 1960s and how it fits into marketing management forms the basis for research on customer experience management. As illustrated in Figure 2:4, this model attempts to explain rational brand choice behaviour within the constraints of limited individual capacities and incomplete information.

The model positions buying behaviour within a system environment of seller and buyer subsystems. Each subsystem is directed by its rational, motivational- and cognitive behavioural objectives (Howard & Sheth, 1969:471). These objectives later play an important role in experiential research and defining customer experience. This notion led a researcher such as Holbrook (1982:136) to conclude that a thin line exists between the experiential view and the research on customer motivation.

Despite the criticism aimed at social sciences in the sixties, marketing researchers kept on highlighting and interrogating customer behaviour and customer decision processes in their research. Possibly in answer to the expressed need for a broader marketing concept (Kotler & Levy, 1969b:10)? The focus on behaviour and decision processes might even suggest the search for an acceptable substitute for the fifties' discredited utilitarian and hedonistic theories. Researchers persistently continued the search for an authentic doctrine on customer (human) motives to fill the vacuum left in the fifties (Ross, 1993:99). The search moved from the classical decision theory, it is a logical choice, to what some researchers see as irrational choices associated with customer needs, to buyer-seller flow models (Holbrook, 1982:132). The search for a behavioural model to fill the vacuum compels Holbrook (1999:3) to characterise the 1960s as the era of “multi-attribute attitude models”.

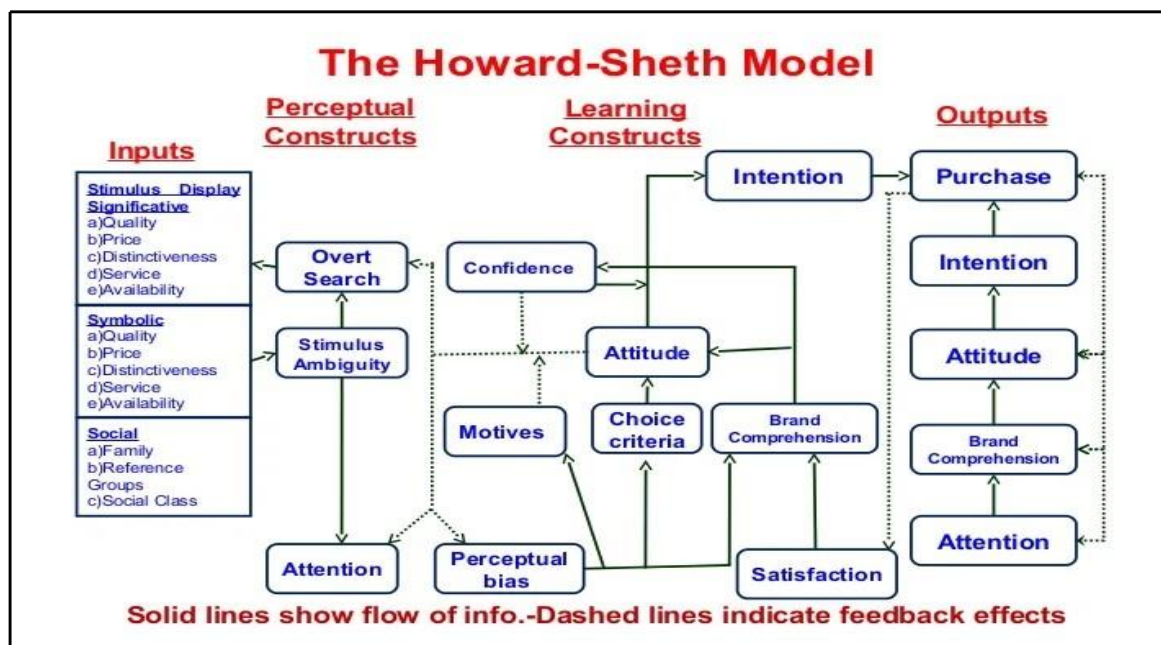


Figure 2-4: The theory of buyer behaviour

Source: Adapted from Howard & Sheth (1969:471)

2.4.3 Customer relationship development – 1970s

The search for a concise model explaining customer behaviour continued into the seventies. Lemon and Verhoef (2016:72) define the seventies as an era of 'customer satisfaction' and 'customer loyalty'. Both elements are measurable and quantifiable assessment metrics of customer attitudes, perceptions, experiences, and reactions towards organisations where customers do business. These elements provide a basis for measuring the effects of customer engagement and are seen by the researchers as important building blocks to understanding customer experience.

2.4.3.1 Customer satisfaction and loyalty

Defining the seventies as "customer satisfaction and loyalty" is somewhat of a narrow definition and interpretation of marketing research into the primary building blocks of the customer experience philosophy. Lemon and Verhoef (2016:74) acknowledge that customer satisfaction could be an element focusing on the cognitive evaluation of customer experience. This is a view supported by Mattila (2005:97), who defined customer satisfaction as "a transitory judgement made based on a specific service encounter". Lemon and Verhoef's reference to "an element" should however point to and directly imply that customer experience consists of multiple elements.

A more comprehensive interpretation and apt description of the research on marketing in the seventies, specifically concerning the development of the customer experience philosophy, might be that of the formal inception of 'customer relationship development'. Howard and Sheth (1969:11) touched on customer relationship development when referring to the buyer-seller relationship in dissecting problems associated with buying behaviour. In summarising 15 years of marketing sciences debate, Hunt (1983:14) concluded that: "marketing science is the behavioural science that seeks to explain exchange relationships". Dwyer *et al.* (1987:11), in referring to research done by researchers such as Bagozzi (1975), Frazer (1983a), Ferber (1970), Kotler (1972) and Luck (1974) conclude that buyer-seller exchange relationships is a critical component of developments in marketing science.

Arndt (1979:72) supports the buyer-seller notion and believes that "marketing is essentially an exchange process". Bagozzi (1975:32) argues that the quest for broadening the marketing concept inadvertently led to the identification of the importance of relationships in marketing. Developing buyer-seller relationships forms part of the all-important aspect of relationship development (Dwyer *et al.*, 1987:12). Dwyer *et al.* (1987) contend that successful relationship development leads to repeat business and sustained profits.

2.4.3.2 Relationship development process

Scanzoni (1979:61-98) identifies the following phases or stages, all relevant to a retail shopping experience, of the relationship development process as illustrated by Dwyer *et al.* (1969:21) in Figure 2.5:

1. **Awareness:** This phase refers to the detection by a buyer that a particular seller might be a feasible exchange partner. The situational proximity between buyer and seller typically aids awareness. Buyers close to local stores or buyers regularly exposed to specific offers as advertised in local media might decide to interact with their local merchants.
2. **Exploration:** Refers to the phase where buyers consider engagement after evaluation and possible testing of merchandise. This phase consists of five (5) subprocesses: attraction, communication and bargaining, development and exercise of power, norm development and expectation development.
3. **Expansion:** Refers to the phase of increasing interdependence due to the continual increase in benefits to the buyer who engages with a seller. The five subprocesses applicable to the exploration phase are also present in the expansion phase.
4. **Commitment:** Refers to the phase where buyer and seller achieve satisfaction with the exchange process and associating benefits, resulting in customer loyalty. The awareness of alternates and alternate exchange partners still exists, but there is no real effort from the buyer to engage alternatives. Three measurement criteria exist for commitment: inputs, durability, and consistency.
5. **Dissolution:** Refers to the phase where parties evaluate their individual positions regarding benefits and costs associated with the relationship. In case of disillusionment, either party might contemplate the possibility of termination or withdrawal from the relationship. Scanzoni does not elaborate in detail on the termination phase except stating that commitment "...becomes a meaningful notion only in the context where termination is a viable option" (Scanzoni, 1979:96).

When considering a customer's relationship journey with and within a business and the impact thereof on experiences, the phases, as identified by Scanzoni (1979:61-98) and elaborated on by Dwyer *et al.* (1969:21) in Figure 2-5, should be considered as important process building blocks for the development of a more rewarding customer experience journey.

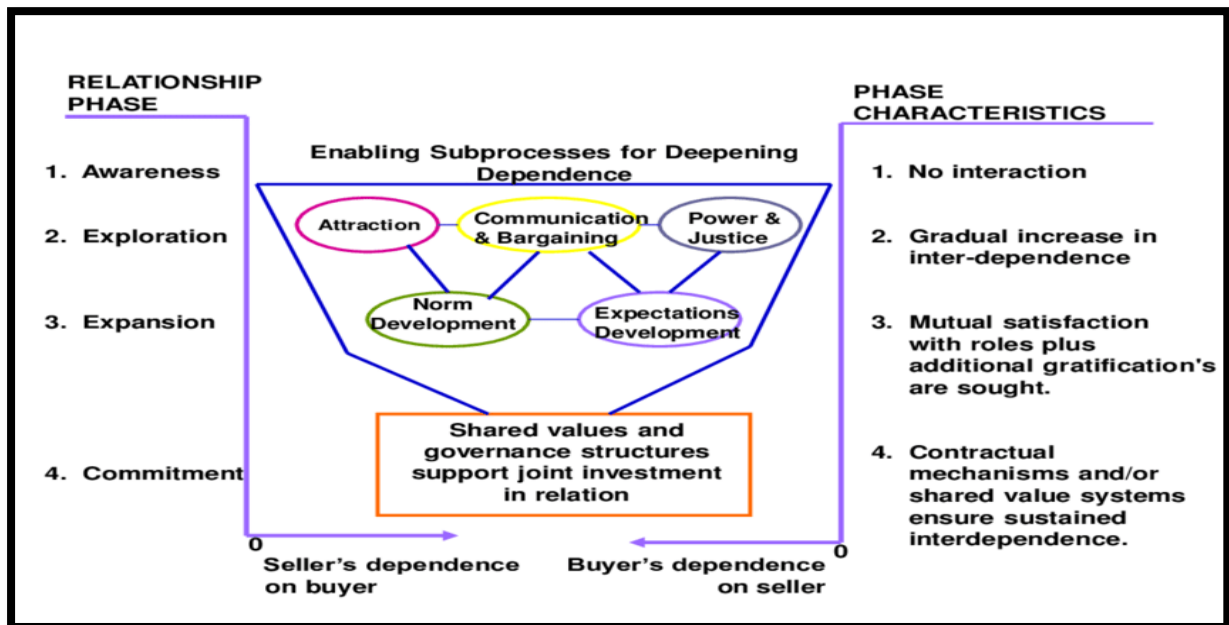


Figure 2-5: The relationship development process

Source: Dwyer *et al.* (1969:21)

This study accepts customer satisfaction and loyalty as foundational cognitive assessment elements of customer experience. The seventies, however, should not be branded exclusively as the era of customer satisfaction and customer loyalty, as Lemon and Verhoef (2016:72) suggested. It might be more appropriate to formally acknowledge the birth of relationship development, a more comprehensive and inclusive theme. Also, to acknowledge that relationship development is an important antecedent and building block to the customer experience philosophy. Especially in light of Scanzoni's phases of a relationship development process (Scanzoni,1979:61-98), all of which are closely related to the conceptual customer experience management constructs as illustrated in Chapter 1, Figure 1-5.

2.4.4 Service marketing with an emphasis on service quality – 1980s

Marketing research of the eighties focused on building customer relationships, creating customer loyalty and promoting customer satisfaction. However, companies' financial performance and customer satisfaction results signalled a "new" differentiator to create a competitive advantage and improved performance.

As post-World War II economies gradually moved away from mass-production-manufacturing industries and international competition between Western and Eastern economies increased, it exposed new vulnerabilities and challenges. Industrial-led environmental pollution and social structure imbalances became more apparent and required urgent attention. Huo and Hong

(2013:40) argue that an economic re-alignment and transformation to address these imbalances became a necessity and was inevitable. The answer, these researchers argue, came in the form of a stronger focus on the growth of a service-led economy supported by the development of a service management paradigm.

A period of heightened awareness that services have the potential to become the new competitive advantage started in the 1980s (Zeithaml & Bitner, 2003:11). Huo and Hong (2013:44-45) identified four distinct stages in the development of a service management theory that can be regarded as pre-cursors to the introduction of the experience concept:

1. The 1970s and early 1980s were the period in which the service industry received focussed attention. Being new and not having any real foundational references, research into the industry was done from a traditional management theory perspective, applying manufacturing industry standards:
2. The middle to late 1980s represents a period where researchers used the characteristics of service industry outputs as a point of departure to formulate, in more detail, the management aspects of the service sector. This inter-alia led to establishing the discipline called “Service Operation Management” at the University of Texas in 1987.
3. By the end of the 1980s up to the early 1990s, the “Service Management Theory” emerged. The interdisciplinary nature of service management came to the fore by drawing inputs from disciplines such as operations management, organisational behaviour, and marketing management. With the ongoing improvement and refinement of the service management theory came an era that was defined as “customer orientation”.
4. The “customer orientation” approach predictably led to further developments in service management. It evolved into a widely accepted sophisticated discipline with sub-disciplines such as service strategy management, service marketing management and service operations management. After an extensive 10-year study in America, the contention was that service, a key element of value, is a driver for maximising company profits and success (Berry *et al.*, 1994:32).

2.4.4.1 Concept of quality

Acknowledging that the focus on services surpasses the operations era, organisations recognise that marketing services are not a carbon copy of marketing goods (Liswood, 1989:42-45). Lemon *et al.* (2016:72) note that this rude awakening led to the development of service marketing as a distinctly separate discipline in the 1980s. Amidst the realisation that the customer and customer

needs to play an increasingly important role in the success of a business, Galloway (1996: 22-29) and Lemon *et al.* (2016:72) argue that entrenched in service marketing should be the concept of quality. As an important parameter in business, quality became the sub-focal point of the 1980s, not only product quality but also service quality (Parasuraman *et al.*, 1985:41-42).

Product quality has always been relatively easy to assess, but services, primarily being “intangible, heterogeneous and inseparable”, pose new challenges (Ghotbabadi *et al.*, 2012:2). Since Zeithaml and Bitner (2003:3) define services as “deeds, processes or performance”, organisations struggle to formulate a realistic view on how their services are being perceived and experienced by customers.

These researchers realised that organisations provide the same type of service but do not necessarily provide the same quality. This led to a deduction that quality can be viewed from different perspectives and means different things to different customers. Zeithaml (1988:2), for instance, expressed the opinion that quality and value, derived from perceived value and utility, are not differentiated. The researcher broadly defines quality as “superiority or excellence” and perceived quality as “the consumer’s judgement about a product’s overall excellence or superiority”.

2.4.4.2 Quality as a value judgement

Holbrook *et al.* (cited by Zeithaml, 1988:5) state that quality is an attitudinal and cognitive value judgment. This is terminology normally associated with social psychology, the study of feelings, interactions, and thoughts where all three aspects work together to produce a human experience (Van Harreveld *et al.*, 2015:6). Lutz (cited by Zeithaml, 1988:5) identifies two types of quality, “affective quality” (overall attitude) and “cognitive quality” (cognitive product evaluation) and states that quality becomes a more effective judgement when the number of experience attributes increases. The researcher concludes by proposing that “affective quality is relatively more likely for services and consumer non-durable goods (where experience attributes dominate) whereas cognitive quality is more likely for industrial products and consumer durable goods (where search attributes dominate)”.

With a service economy, the new growth area and research uncovering the intricacies of quality, ‘service quality’ became the “buzzword” of the 1980s. Parasuraman *et al.* (1985:42) defined service quality as “a measure of how well the service level delivered matched customer expectations”. Much later, Mattila (2005:97) defined the same concept of service quality as a “global assessment based on long-term attitude”.

2.4.4.3 Service quality as a new differentiator

Service quality was now officially recognised and considered as the new differentiator. It serves as the competitive edge companies were searching for as it has the potential to improve profitability, increase market share, customer loyalty and probability of purchase (Brady & Cronin, 2001:44). This unleashes a flood of research into the service industry and particularly the subject of the service quality.

It became notable to academics and organisations responsible for the formulation of customer strategies, unpacking the service economy, defining service quality and its constituent elements, and understanding customer service quality perceptions (Ghotbabadi *et al.*, 2012:2). This need resulted in the development of several service quality frameworks. The first is the "Nordic" model by Grönroos formulated in 1982, 1984 (Grönroos, 1998:327), focussing on functional (how service is delivered, defining customer perceptions of service) and technical quality (what customer receives) (Brady & Cronin, 2001:35).

2.4.4.4 SERVQUAL model

The Nordic model was followed by an "American" model between 1983 and 1988 called "SERVQUAL", developed by Parasuraman, Zeithaml, and Berry (Brady & Cronin, 2001:34). The SERVQUAL model, better known as the gaps model, remains one of the most insightful contributions to marketing theory (Ghotbabadi *et al.*, 2012:2). Over the years many researchers endeavoured to validate and improve the scales and many an application had been advanced from this service quality model (Brady & Cronin, 2001:34).

Parasuraman *et al.* (1985:42) state that quality evaluations typically involve outcomes and processes when researching the formulation of the SERVQUAL service quality model. Through in-depth interviews with executives of service companies and consumer focus groups, the researchers identified gaps between service quality expectations and perceptions of the service quality delivered among management and customers. Focus group interviews lead to identifying ten (10) "service quality determinants" used by customers in evaluating service quality. The ten determinants, the basic structure of service quality, from which the SERVQUAL scale was to be derived, are reliability, responsiveness, competence, access, courtesy, communication, credibility, security, understanding the customer and tangibles (Parasuraman *et al.*, 1985:47).

Ongoing empirical research by Parasuraman *et al.* (1988:12-40) confirms the researchers' comment of 1985 that some of the ten determinants of service quality might be overlapping (Parasuraman *et al.*, 1985:46). Through repetitive, iterative sequences of analyses, the

researchers confirm some overlapping resulting in seven (7) dimensions. Further scale purification resulted in reducing the seven dimensions to the following five (5) dimensions being labelled “SERVQUAL”:

1. **Tangibles:** Physical facilities, equipment, and appearance of personnel.
2. **Reliability:** Ability to perform the promised service dependably and accurately.
3. **Responsiveness:** Willingness to help customers and provide prompt service.
4. **Assurance:** Knowledge and courtesy of employees and their ability to inspire trust and confidence.
5. **Empathy:** Caring, individualised attention to customers.

The service quality model in Figure 2-6, adapted with the research findings of 1988, displays a summary of the researcher's key findings on service quality and the factors affecting it (Parasuraman *et al.*, 1985:44; 1988:23).

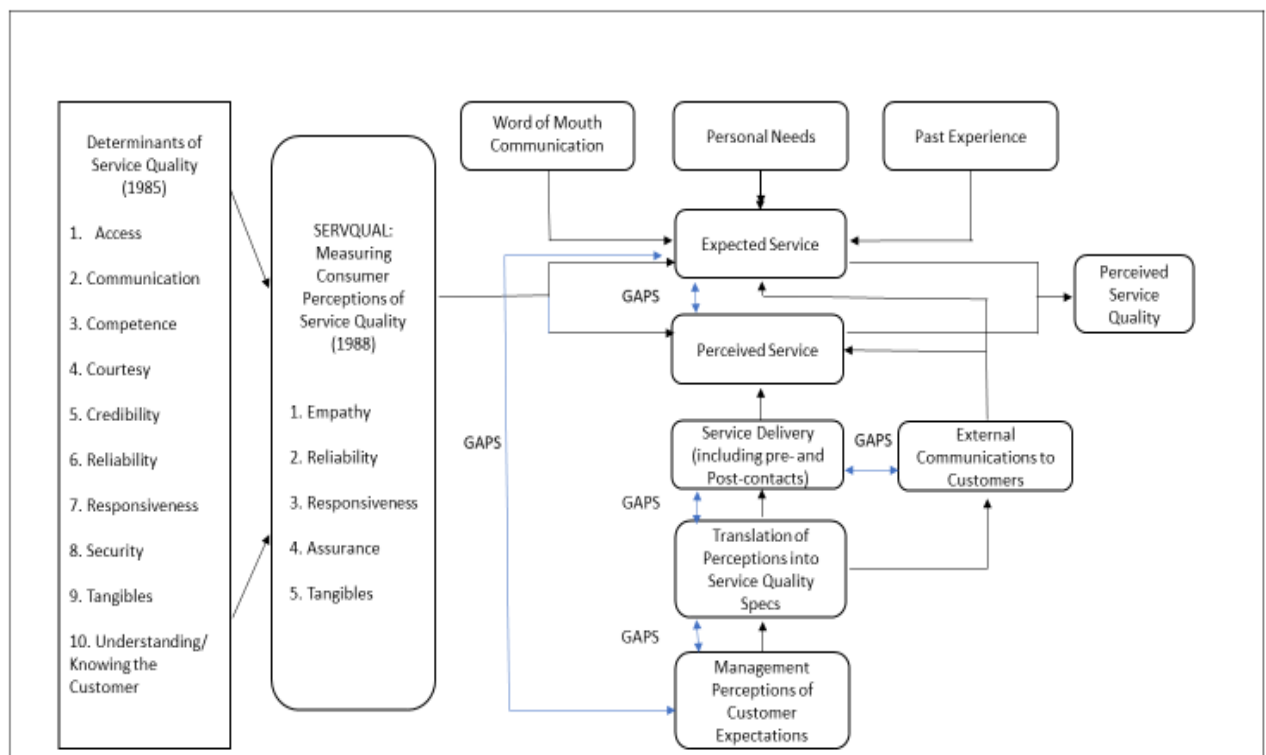


Figure 2-6: Service quality model with SERVQUAL determinants

Source: Adapted from Parasuraman *et al.* (1995:44, 1988:23)

The contribution of quality and its constituent elements in the evolutionary development of the customer experience philosophy should not be underestimated. Table 2-1 illustrates a cross-section of determinants or dimensions of service quality as identified by different researchers.

Table 2-1: Determinants/dimensions of service quality

Determinants of service quality (Parasuraman <i>et al.</i> 1985)	Service quality ring - interrelationships (Berry <i>et al.</i> 1994)	Key determinants of service quality (Gronroos in Galloway 1996)	Key dimensions of service quality (Lehtinen & Lehtinen in Galloway 1996)
Understanding customers	Listening	Accessibility and	Interactive quality:
Access	Basic service	Flexibility	- Customer contact
Responsiveness	Service design	Behaviour and	Corporate quality:
Communication	Service recovery	Attitudes	- Image
Courtesy	Surprising customers	Professionalism and	- Profile
Competence	Fair play	Skills	Physical quality:
Credibility	Teamwork	Reputation and	- Equipment
Reliability	Employee research	Credibility	- Premises
Security	Servant leadership		- Tangibles
Tangibles	Reliability		

Source: Adapted from Berry *et al.* (1994:43), Galloway (1996:22), Parasuraman *et al.* (1995:44)

Service quality of the 1980s represents an important precursor to the customer experience philosophy. Lemon and Verhoef (2016:72) credit the service quality development for providing “(1) the context in which experiences arise, and (2) the journey mapping and measure/assessment aspects of customer experience”. This study postulates that most of the service quality determinants listed in Table 2-1 should, directly or indirectly, feature in the design of any conceptual customer experience journey.

2.4.4.5 Service management

Though service quality had the centre stage of the 1980s, other determinants within the emergence of ‘service management’ played an important role in developing the customer experience philosophy. Zeithaml (1988:3), after exploratory research, focus groups, and in-depth customer interviews, argues that price and perceived value are as important determinants of customer perceptions as quality. The researchers’ proposed model (Figure 2-7), an adaptation of an earlier model presented by Dodds and Munroe in 1985, shows the relationship among the three concepts: quality, perceived value, and price (Zeithaml, 1988:4).

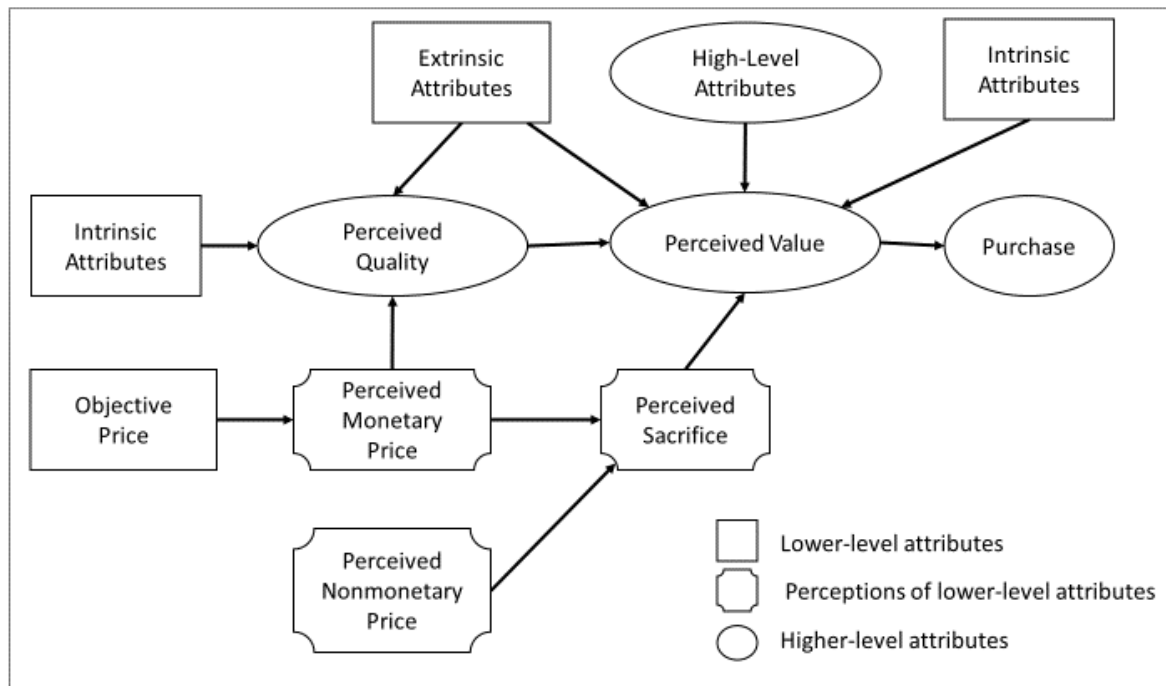


Figure 2-7: A means-end model relating price, quality, and value

Source: Zeithaml (1988:4)

2.4.4.6 Service science

As an extension to the field of service marketing came the introduction of an even broader concept, the rise of a discipline called 'Service Science'. Supplementary to each other is the service sector development and service management theory. The latter lays a "theoretical basis for the discipline of Service Science whereas modern operations research and modern information science, thriving with the development of modern information technology, offers adequate scientific tools for the development of Service Science" (Huo & Hong, 2013:44).

It is argued that this new discipline, stemming from the service economy era, will be the enabler to enter the era of service economy with success (Huo & Hong, 2013:44). Service economy success through the application of service science principles is a foundational cornerstone from which the customer experience philosophy evolved (Ghotbabadi *et al.*, 2012:6).

With the rise of service sciences came developments in customer shopping behaviour as an augmentation to the broader field of service management. It could well be argued that these developments rank equally important to studying service quality. It might even be postulated that progressive developments in service management should define the 1980s. Service quality features prominently in these developments and plays a noticeable role in the evolutionary development of the customer experience philosophy. Another important precursor to customer

experience from the 1980s, which should not be disregarded, was the foundational research done on buyer-seller relationships (Dwyer *et al.*, 1987:11-27).

2.4.5 Relationship marketing – 1990s

The contribution to customer experience and customer journeys from the 1980s is embedded in the broader definition of service, service management and service science. The primary focus of this era revolved around activity, outcome, performance, process, and exchange, with the aspect of a relationship featuring more prominently (Dwyer *et al.*, 1987:11; Grönroos, 1996:5-12; Vargo & Lusch, 2004:2; Zeithaml & Bitner, 2003:3).

Though the aspect of the relationship is “a new-old concept”, the 1990s “witnessed emerging attention on developing strong relationships with customers” (Berry, 1995:236; Lemon & Verhoef, 2016:72). ‘Relationship Marketing’ as a phrase, was first introduced by Berry in 1983 as part of a strategy to counter the difficulty in assessing value gained from intangibilities such as services (Crosby & Stephens, 1987:404). Berry introduced a relationship marketing strategy comprising five elements: a “core service” as a basis for building a relationship, a personalised service for an individual customer, introducing value-adds to a core service, formulating appealing pricing tactics to encourage customer loyalty and implementing employee marketing initiatives to motivate employees to provide their best to customers (Berry, 1995:236).

Up to the early 1990s, businesses relied on customer transaction data analyses to formulate strategies to increase market share and profits, primarily by focusing on acquiring new customers (Pansari & Kuma 2018:1). Since Berry defined relationship marketing in 1983 as “attracting, maintaining, and in multi-service organisations, enhancing customer relationships”, not much attention had been given to customer retention (Berry, 1995:236). Organisations focus more on attracting new customers than retaining existing ones (Schneider, 1980:54).

2.4.5.1 Customer retention through relationship

Marketing literature attentively called for a different approach to the widely accepted marketing mix focus. The traditional Four-P’s (product, price, place, promotion) were regarded as not encouraging building customer relationships but marginalising such efforts (Ballantyne *et al.*, 2003:160). Research increasingly pointed to the importance of customer retention to ensure increased market share and profits. This convinced organisations to seriously reconsider their marketing approaches. Researchers such as Lindgreen and Antiooco (2005:136) argue that marketing practices should acknowledge the importance of relationships, networks, and customer

interactions. With the pursuit of greater marketing productivity, Sheth and Parvatiyar (1995:255) state that the solution to increased market share and profits lies within relationship principles.

2.4.5.2 Relationship marketing as new paradigm

Ongoing research into services marketing and customer relationship economics pointed more and more to relationship building and relationship management as the answer to organisations' sustainability problems. Webster (1992:1) refers to strategic partnerships and customer relationships as the “new marketing conception”.

Grönroos (1994:4) narrowed it further and pronounced relationship marketing as the new paradigm in services marketing. Gummesson (1998:243) maintains that service marketing research focusing on relationships and interactions is one of the “most crucial contributions” to relationship marketing. Not that relationship marketing is a new concept. Sheth and Partiyar (1995:255) pointed out that relationship marketing is not entirely new and dates back to the pre-industrial era with ties to consumer behaviour theories.

In the late 1990s, businesses realigned to focus less on transaction marketing and more on ongoing relationships between all parties involved in marketing and relationship marketing (Sheth & Parvatiyar, 2000:140). The strategy was to build relationships and improve customer trust, commitment, and loyalty (Pansari & Kuma, 2018:1). As relationship marketing gained momentum, it became the new focus area in marketing practice and research. Marketing to existing customers became integrated into various subdisciplines of marketing science (Berry, 1995:237). The primary aim was to create and strengthen long-term relationships between customers and businesses for all stakeholders' mutual benefit (Percy *et al.*, 2010:2596).

Grönroos (1996:7) defined relationship marketing as: “Relationship marketing is to identify and establish, maintain and enhance relationships with customers and other stakeholders at a profit, so that the objectives of all parties involved are met and that this is done by mutual exchange and fulfilment of promises.” Grönroos identified strategic and tactical issues that businesses should consider in applying relationship marketing (Table 2-2). These strategic and tactical issues also shape the customer experience philosophy and journey methodology.

Table 2-2: Issues in relationship marketing

Strategic Issues	Tactical Issues
• define the firm as a service business	• seek direct contact with customers
• manage from a process management perspective	• building a database
• develop partnerships and networks.	• develop a customer-oriented service system

Source: Adapted from Grönroos (1996:9,11)

Grönroos's (1996:9) strategic premise that every business should be defined as a service business is supported by Holbrook (1999:9), who states that: "products provide services in their capacity to create need-or-want-satisfying experiences". To establish a relationship, customers demand value from the complete service offering from each element of the organisational value chain. A business must apply a process management approach across all its functions/departments responsible for the different components of the offering to create value and build lasting relationships with customers (Grönroos, 1996:10). The process management approach should be applied with the understanding that relationships are dynamic, can change over time and generally evolve through the five (5) phases as mentioned in paragraph 2.4.3, namely awareness, exploration, expansion, commitment, and dissolution (see Figure 2-5) (Dwyer *et al.*, 1987:15).

2.4.5.3 Service dominance logic

In an era of relationship marketing, where exchange processes and relationships are important, a "service-dominance logic" must become a guiding principle. This logic should encapsulate, enhance, extend, and promote earlier research on relationships within the marketing discipline (Vargo & Lusch, 2004:1-17). In line with the service-dominance logic, the academic focus shifted from the 'thing' to be exchanged to the 'process' of exchange. (Vargo & Lusch, 2004:15). It shifted from not only doing things for customers but doing things jointly (cooperatively) with customers (Vargo & Lusch, 2004:11).

Consistent with earlier views of Berry *et al.* (1996:6), the logic describes a service-centred view as: "the interactive definition of the individual customers' problem, the development of a customized solution, and delivery of that customised solution to the customer. The solution may consist of a tangible product, an intangible service, or some combination of both. It is not the mix of the solution (be it product or service) that is important, but that the organisation interacts with each customer to define the specific need and then develops a solution to meet the need."

Important to the development of customer experience journeys are the underlining characteristics of a service-dominant logic as described by Vargo and Lusch (2004:5):

1. The emphasis is on intangibility, exchange processes, and relationships. It is customer-centric, relational and market-driven, where value is defined by and co-created with the customer. It implies customer collaboration, learning from customers, and adapting to their needs.
2. The deployment of specialised competencies and resources such as knowledge, communication, skills, involvement, cross-functional cooperation and collective learning through activities, social and economic processes, and executions for the mutual benefit of all stakeholders.
3. The competencies and resources are often invisible, intangible, dynamic and infinite and are embedded in routines, actions, processes, and operations that are implied, sometimes debatable, and sometimes peculiar.
4. Engagement and participation in the exchange process are more important than the physical transaction.

Service-dominant logic characteristics and the theoretical elements associated with the relationship marketing theory (such as Dwyer's five phases of relationships) presented the need for an in-depth understanding of the emotional aspects related to marketing relationships and the organisational management (Bagozzi *et al.*, 1999:202). This understanding of the emotional aspects is vital in customer relationship management and how such emotions relate to a customer's experience (Lemon & Verhoef, 2016:72).

2.4.6 Customer relationship management - 2000s

Consistent with the view that customers demand value, Ballantyne *et al.* (2003:161), claim that the future of relationship marketing lies in "value exchange" as a fundamental non-negotiable. These researchers regard 'value' as the result of repeated transactions created through mutually interactive processes and interactions within network relationships that present value exchange potentialities.

The focus on relationship marketing of the 1990s evolved primarily around building strong relationships with customer bases. Grönroos's (1996:7) definition of relationship marketing identifies an essential precondition of relationships and states that "Relationship marketing is to identify and establish, maintain, and enhance relationships with customers and other

stakeholders at a profit so that the objectives of all parties involved are met and that a mutual exchange and fulfilment of promises do this. It implies that the prerequisite or objective of relationship marketing revolves around extracting value from the relationship. However, limited attention was given in the 1990s to research on customer relationship economies and effective management to extract the required value (Storbacka *et al.*, 1994:21).

2.4.6.1 Customer relationship economies

Research in the 2000s attempted to overcome the shortcomings of the 1990s. Customer relationship economies, the extraction of value, and the management of relationships became the trademark focus of the 2000s. Lemon and Verhoef (2016:72) note that the focus was squarely on customer value management and the optimisation of customer profitability through a concept called “customer relationship management “(CRM). The objectives of CRM include the identification of the most profitable customers and the alignment of interactions with such customers to optimise the current and future value of customers for the company (Kumar & Reinartz, 2018:5). Though the focus was on strategies of value creation through customer acquisition and retention, Kumar and Reinartz (2018:5) claim that researchers could not find conclusive evidence that CRM approaches deliver significant value to customers or businesses.

In searching for an answer to the apart CRM problem, Parvatiyar and Sheth (2001:4) in researching the concept of CRM, conclude that relationship marketing and CRM, as discussed in marketing literature, are not noticeably different from one another and are used as interchangeable concepts. However, Zablah *et al.* (2003:116) suggest only a symbiotic and synergetic relationship between the concepts and regard CRM as a “philosophically related” descendant of relationship marketing. Payne (2005:1) acknowledges that CRM, also labelled ‘Customer Management’ by some researchers, builds on customer relationship principles and uses information-enabled relationship marketing to serve customers.

This relationship between the marketing concepts is also visible in Kumar and Reinartz’s (2018:5) comment that CRM “is a relationship management concept based on established marketing principles that recognise the need to balance organisational and customer interests carefully”. Parvatiyar and Sheth’s (2001:6) definition of CRM describes the mentioned “interests” as being objective to focus on marketing productivity through value creation: “Customer Relationship Management is a comprehensive strategy and process of acquiring, retaining and partnering with selective customers to create superior value for the company and customer”.

2.4.6.2 Economic value of a relationship

Though there are different interpretations and definitions of CRM in marketing literature Kumar and Reinartz (2018:5) maintain that 'customer value', referring to the economic value (contribution margin or net profit) of a relationship, remains critical to CRM implementation.

In their comprehensive definition of CRM, Payne and Frow (2005:177) also accentuate the value objective: *"CRM is a strategic approach that is concerned with creating improved shareholder value through the development of appropriate relationships with key customers and customer segments. CRM unites the potential of relationship marketing strategies and IT to create profitable, long-term relationships with customers and other key stakeholders. CRM provides enhanced opportunities to use data and information to both understand customers and co-create value with them. This requires a cross-functional integration of processes, people, operations, and marketing capabilities that is enabled through information, technology, and applications."*

2.4.6.3 Customer data management

There is an opportunity to use customer data and information points to associate important customer activities with CRM. Collecting and effectively applying customer and other related information "to build a constantly superior customer experience and enduring customer relationships" is an important cornerstone of CRM (Payne & Frow, 2005:170). This process of transforming customer data into meaningful customer information remains an ongoing challenge, with Buttle (2004:(x)) suggesting that businesses should rise above basic measurement and reporting and enhance their capabilities and ability to "leverage more valuable insights" from their customer information. Using customer information to tailor marketing efforts and surroundings at front-end customer-facing delivery mechanisms should become a core objective of any organisation (Sheth *et al.*, 2001:6).

Multiple studies on CRM and its implementation in various business entities present researchers with wide-ranging descriptions, definitions, and perspectives. Some researchers view CRM as a customer data management tool that directs marketing focus and creates customer value. Others regard it as inclusive of various marketing and channel initiatives (loyalty programs, call centres, websites). Some researchers have a broader view of CRM as a mix of "marketing strategy, organisational structure and processes and technology." (Chetioui & Abbar, 2017:290).

2.4.6.4 CRM continuum

The wide-ranging perspectives and opinions on CRM compelled Payne and Frow (2005:168) to review CRM definitions from various sources and present a guiding continuum of perspectives on

CRM. The researchers range CRM from a narrowly applied technology solution to a multiple integrated customer-focused technology solution, and even to a strategic customer-centric application. Kumar and Reinartz's (2018:5) research led to similar perspectives on CRM applications. Their findings point to three different perspectives: an application of CRM on a limited functional level (for example, sales force automation), on a total customer experience level involving the customer-facing front-end, and on a strategic customer-centric level focussing on delivering value and satisfaction to customers with reciprocal value generation for an organisation (Figure 2-8).

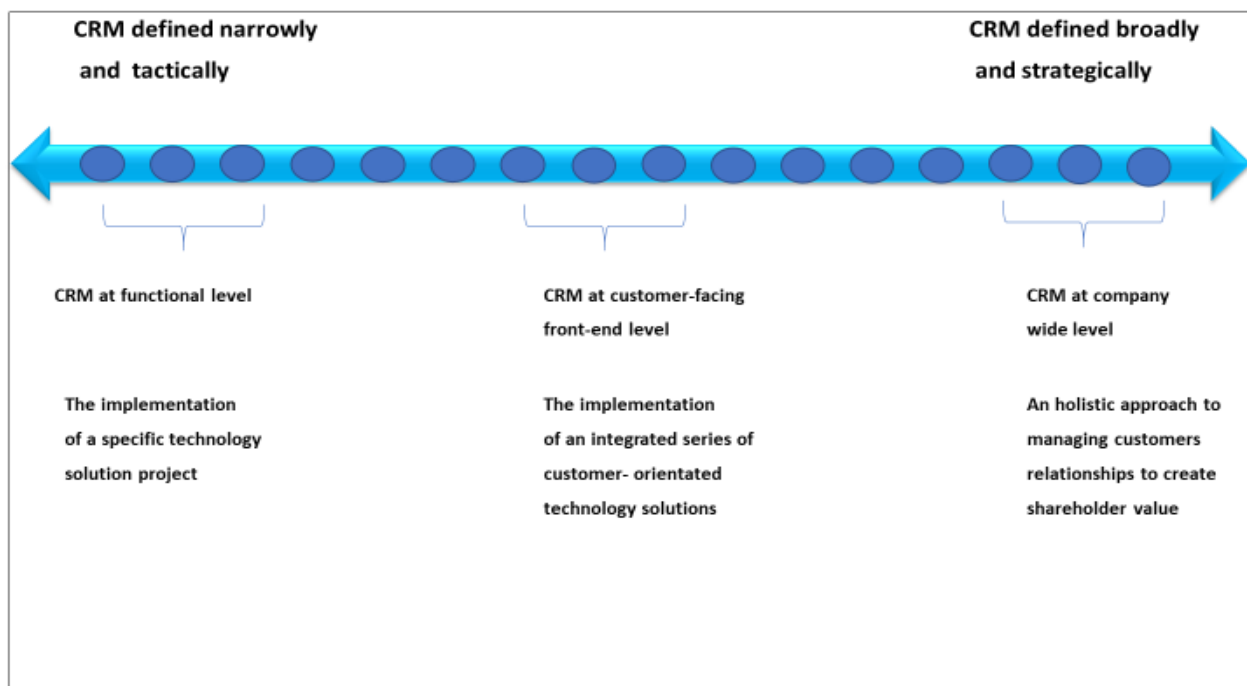


Figure 2-8: The CRM continuum

Source: Adapted from Payne & Frow (2005:168)

Many questions regarding the applicability and value of CRM have been raised in the literature. Is it a short-lived fad, fashionably quoted by many without understanding its meaning and application? Is it an extraction and combination of basic marketing concepts labelled as the be- and end-all of marketing theories? Does CRM represent a fresh approach to marketing led by “the continuing evolution and integration of marketing ideas and newly available data, technologies and organisational forms”? (Boulding *et al.*, 2005:156).

The contribution of CRM to marketing theory probably lies in the evolutionary development of CRM, as concluded by Kumar and Reinartz (2018:12) and illustrated in Figures 2-9. It is, in particular, the developments from a customer-facing experience level (third generation, >2002) through the strategic application level to the social CRM level (fifth generation, >2015) that

highlight relationships between different elements of customer experience and its role in customer and business value management (Lemon & Verhoef, 2016:73; Kumar & Reinartz, 2018:12).

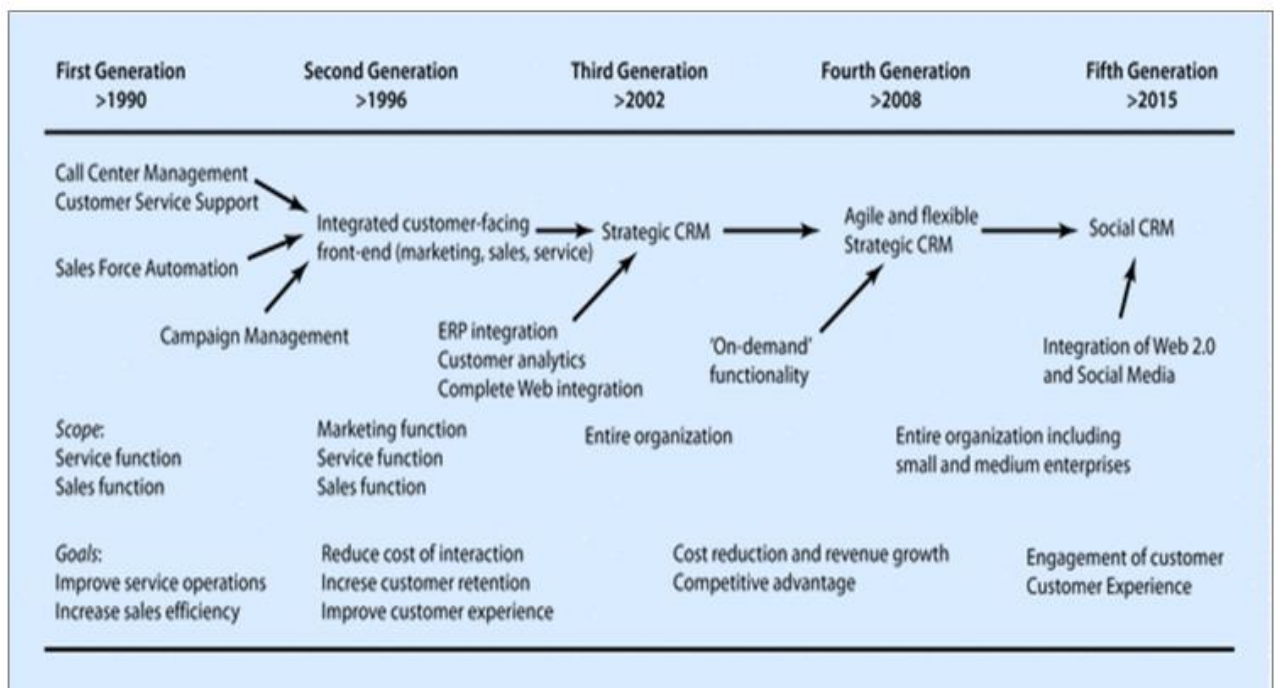


Figure 2-9: Evolution and growth of CRM

Source: Kumar & Reinartz (2018:12)

Contrary to criticism of CRM, Boulding *et al.* (2005:156) maintain that it does not restate existing marketing concepts in a new format. These researchers support the notion from Payne and Frow (2005:168) that CRM is important to organisations as it: “requires a cross-functional integration of processes, people, operations, and marketing capabilities that is enabled through information, technology, and applications”.

This study postulates that the contribution of CRM to the development of a customer experience journey lies in the customer and relationship principles exposed through its evolutionary development, as illustrated by Kumar and Reinartz (2018:12) in Figure 2-9. In addition, Payne and Frow’s (2005:168) contribution to the CRM debate points to the importance of a cross-functional integration of organisational elements at a customer-facing front-end level. The successful cross-functional integration at a retail store level is also critical to developing a customer-centric customer experience journey.

2.4.7 Customer centricity and customer focus – 2005’s

A recurring statement by researchers in their assessment and contribution to the evolutionary development of marketing theory is that some concepts used in marketing management are not

entirely new. Berry (1995:236) aptly refers to the “new-old” concept. The customer centricity and focus developments of the mid 2000s fall into this “new-old” category.

Buyer-seller relationships and the appreciation of individual customer’s needs and wants were normal practices (not necessarily formally rooted in marketing theories) post-World War II. A gradual shift away from these narrowly defined practices occurred after World War II with the inception of mass production, attention to markets rather than products, an increased emphasis on segmentation, mass distribution and communication with marketing activities focusing on promotion, pricing, and distribution (Drucker, 1954:34). As marketing science evolved, companies developed a growing dissatisfaction with post World War II marketing approaches as it negatively impacted on marketing productivity (effective and efficient marketing) (Kotler & Levy, 1969b:10).

2.4.7.1 Customer needs and wants

This trend forces researchers to return their attention to customers' individual needs and wants (Ennis, 2016:153). It resulted in a “widespread adoption of customer-centric marketing in place of product- and segment-centric marketing to effectively and efficiently serve customers” (Sheth *et al.*, 2000:55).

Customer-centric marketing focuses on delivering value to individual customers (Lemon & Verhoef, 2016:73). In the broader context, the concept of value refers to a customer’s desired value versus the value they received, defined by Woodruff (1997:142) as: “the level of value experienced from actually using the offering.” The point of departure remains the requirements of the individual customer. Even to the extent of developing customised or standardised individualised customer offerings (Berry *et al.*, 1996:6; Terblanche, 2018:56). Or the need to change the traditional marketing mix elements to comply with or satisfy individual customers' needs, wants, and resources. (Sheth *et al.*, 2000:56).

The mid-2000s characterised a period where companies increasingly felt the pressure of escalating commoditisation. This compelled organisations to concentrate more on creating a stronger customer-centric focus as an “antidote” to the diminishing productivity of marketing expenditure associated with commodification (Gulati & Oldroyd, 2005:92; Sheth *et al.*, 2000:58).

2.4.7.2 Customer-centric fundamentals

Gulati and Oldroyd (2005:94), after a two-year in-depth study of seventeen customer-centric orientated companies, found that these companies attribute their successes to focus on three fundamentals consistently:

1. Create a detailed understanding of each customer's needs and wants.
2. Constantly update the customer information with new information forthcoming from customer-facing staff.
3. Use the information in organisational strategy, structure formulations, and all product and service decisions.

The researchers Gulati and Oldroyd (2005:95) furthermore identified that customer-centric companies all followed a distinct four-phased approach to create a customer focussed ethos within their companies:

1. "Communal Coordination" is recording each customer interaction across the business into a centralised customer information repository, enabling a single view of a customer.
2. "Serial Coordination", is the analysis and dissemination of customer information (intelligence) to the different organisational units to enhance current knowledge of customers and markets and for application in the marketing strategies and tactics.
3. "Symbiotic Coordination" utilises and models customer information to forecast customer behaviour. To develop, implement and measure focussed interventions to influence customer behaviour and refine such modelling with customer-facing staff feedback.
4. "Integral Coordination" is the internalisation of customer intelligence through coordinating activities across divisional boundaries to positively influence and change workforce attitudes, behaviour and eventually the organisation's culture towards customer centricity.

2.4.7.3 Customer value management

Kumar and Reinartz (2018:6) emphasise understanding and influencing customer behaviour and regard introducing a customer-centric business strategy as an important enabler to achieve these goals. They believe that product-centric strategies are outdated and not as successful in influencing customer behaviour as in the past and thus propose customer-centric strategies with customer profitability as a key objective. In support of this objective, the marketing management approach should focus on customer demands, customer heterogeneity, customer data integrity, value provision, product and service customisation and marketing accountability. Kumar and Reinartz (2018:11) define this approach, or focus, as 'customer value management'.

The customer-centric and customer-focused approach signifies the constant search for the 'magical' methodology that delivers a competitive edge and ensures long-term sustainability. This

approach brings the needs and wants of the individual customer back into the fray of marketing science and places the emphasis squarely on value creation for the individual customer (Srivastava *et al.*, 1999:168). Lemon and Verhoef (2016:73) state that this approach prepared the marketing fraternity for a renewed emphasis on the customer experience.

In referring to the evolution of marketing-based competitive advantages since the 1950s, Palmer (2010:197) suggested that customer experience may become a differentiator “in markets where relationships have ceased to be a point of competitive differential advantage.” (Figure 2-10). The researcher alerts explicitly to customer “value” but identifies the value from a much broader customer experience value perspective.

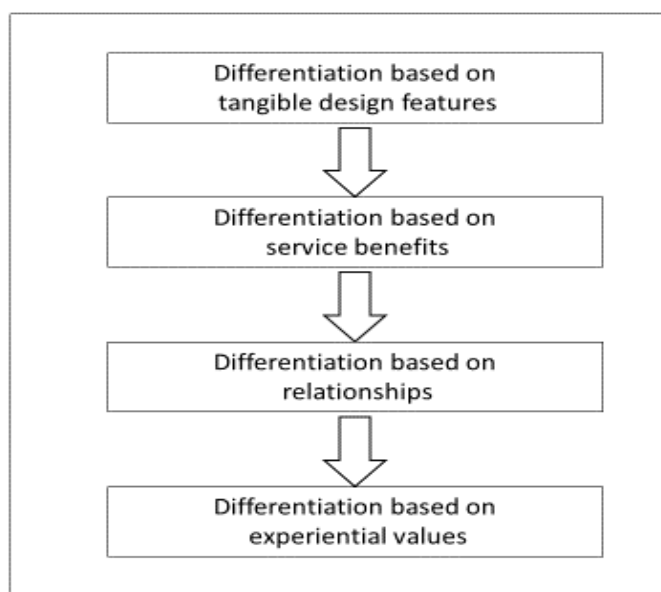


Figure 2-10: Evolution of marketing-based competitive advantages

Source: Adapted from Christopher *et al.* (1991)

2.4.8 Customer management and customer engagement – 2010s

Organisations evolving into customer-centric and customer-focused entities did not occur at the expected pace. It was much slower and less widespread than initially anticipated (Verhoef *et al.*, 2010:247). Similarly, the expectation that replacing a product-centric approach with a customer-centric approach “would expand marketing’s sphere of influence” did not come to fruition (Webster *et al.*, 2005:36). A possible reason for the slow uptake is postulated by Verhoef *et al.* (2010:247) in stating that the emerging trend among researchers and organisations to emphasise the concept of customer management (CM), should eventually lead to stronger customer-centric and customer focussed organisations. It is the need for different and more advanced CM

methodologies to manage customers (the “how’s”) that led researchers back onto the path of CM as a means towards creating customer-centric organisations (Pansar & Kumar, 2018:1). Verhoef *et al.* (2010:247) note that research into the field of CM primarily revolves around two areas of interest:

1. The measurement of different forms of customer value, the drivers and the outcomes that enable the optimal direction and allocation of organisational resources to customers.
2. To create and advance an effective CM process within organisational cultures and structures.

Embedded into CM is CRM, as suggested by the first area of interest and customer engagement (Verhoef *et al.*, 2010:248). The engagement concept, however, is not new. Vivek *et al.* (2018:47), in their customer ‘engagement’ research, drew insights from the social exchange theory of the 1950s. Reinartz and Berkmann (2018:252) refer to the many types of engagement behaviour researched and practised and state that all had initially been researched as separate standalone constructs. In considering customer behaviour, Verhoef *et al.* (2010:248) adopted the view that these engagement constructs form part of an overarching customer engagement phenomenon.

As marketing management and organisational objectives evolved towards creating value-driven relationships, organisations increasingly strived to engage customers effectively in all possible ways (Pansari & Kumar, 2017:295). Having a sound CRM- base in an organisation with appropriate marketing and customer databases, and metrics, the organisational CM-core moved from transactional- to relational- to customer engagement management (Pansar & Kumar, 2018:1).

Customer engagement (CE) as a methodology emerged from the CM ‘toolbox’ in a manner fittingly described by Palmatier *et al.* (2018:viii): “Nowhere, however, is this shift more relevant or evident than in the changing perspectives and practices in marketing, where “customer engagement” has been sneaking into where we once said, “relationship marketing” or “customer relationship management.” Importantly, these cultural shifts were matched by unprecedented visibility of customer thoughts, connections, and even moment-by-moment behaviours and reactions, providing the infrastructure for converting this movement into strategic insights.”

The “customer engagement movement” as described by Palmatier *et al.* (2018:viii), is a hierarchical step in the evolutionary development of the customer management approach, as illustrated by Pansari and Kumar (2017:295) in Figure 2-11.

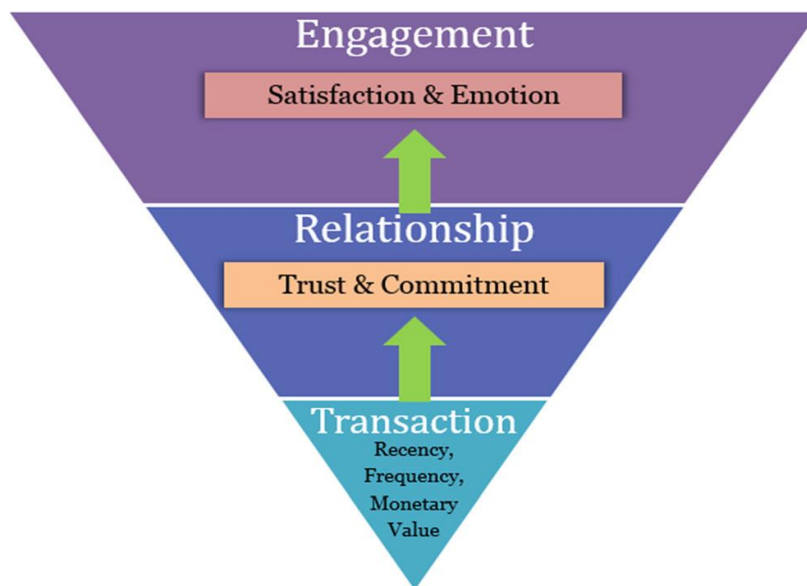


Figure 2-11: The evolution of customer management

Source: Pansari & Kumar (2017:295)

2.4.8.1 Customer interactions

Evolving from customer relationship developments came the realisation among organisations that promoting two-way relationships through creating interactions between customers, organisations and among customers is a requirement to develop more profound, intimate, meaningful, and long-lasting relationships with customers. These interactions manifest as activities and require active participation between parties to be considered customer engagement (Kumar *et al.*, 2010:297). Only if the quality of the interaction leads to a satisfied relationship, developed based on trust and commitment, can it lead to emotional bonding, and only then can it be regarded as customer engagement (Pansari & Kumar, 2017:295,308).

Researchers increasingly focused on the emerging perspective in customer management, the concept of customer engagement. As with most concepts in marketing, ‘engagement’ is not new, and it presents itself in various forms and definitions (Verhoef *et al.*, 2010:249). It is these different forms and definitions of CE that compel Pansari and Kumar (2018:4) to declare confusion on CE and CRM-related constructs and the variety of customer-centric metrics: “For instance, customer experience, customer involvement, customer satisfaction, customer commitment, and so on are misinterpreted frequently as customer engagement”. Pansari and Kumar (2018:4) also refer to the misunderstanding that exists between the customer engagement and customer experience constructs: “customer experience is the customer’s response to the firm’s actions, whereas customer engagement is the contribution the customer makes to the firm’s revenue, directly or indirectly.”

From the assortment of CE definitions, it is clear that customer engagement represents an elevated state of customer involvement and connection with the organisation of their choice. Brodie *et al.* (2011:260) refer to a customer's physiological connection resulting from a participative "interactive, co-creative customer experience" with an organisation, its products, staff, brand, or any other element thereof. Verhoef *et al.* (2016:73) note that motivation to participate results from such a customer experience.

2.4.8.2 Engagement is a behavioural construct

Vivek *et al.* (2012:133) also emphasised participation and connection but suggested it is an intensified, not a cordial, relationship between customer and organisation. Kumar *et al.* (2010:307) define customer engagement from a different perspective and emphasise the value being created for the organisation by a customer through transacting, referring potential customers, encouraging customers to conduct more transactions and providing feedback on possible improvements. These four elements constitute customer engagement value.

Van Doorn *et al.* (2010:254) classify customer engagement as a "behavioural construct" that extends to non-purchase transactions. The researchers considered a variety of customer behavioural terms (e.g., retention, referrals, cross-buying, and word-of-mouth) and declared that, though they represent different manifestations toward a brand or business, they all can be regarded as motivational drivers associated with customer engagement. Van Doorn *et al.* (2010:255) caution that customer attitudes such as commitment, satisfaction and trust should not be confused with customer engagement behaviours.

Kumar *et al.* (2010:298) agree with Van Doorn on the importance of customer engagement behaviour to the extent that they also warn against the exclusion there-of as it could lead to an over- or under-evaluation of customer value. A wrong customer value assessment can misallocate organisational resources across customers (Verhoef *et al.*, 2010:249). But Kumar *et al.* (2010:298), focussing on customer value creation, disagree with Van Doorn that non-purchase transactions primarily constitute customer engagement.

Kumar *et al.* (2010:298) argue that a transactional purchase, resulting from motivational drivers similar to those mentioned by Van Doorn, is also a behavioural construct and should be included as customer engagement behaviour. This is in line with a statement by Narayandas (2005:136) that a customer-business relationship commences after the customer transacts with the business, and that transaction then forms the base for a mutually beneficial relationship that evolves further over time. It should, however, not be confused with "customer involvement" as this refers to the situation before the customer performs a purchase (Pansari & Kumar, 2018:4). Thus when Kumar

et al. (2010:297) define 'customer engagement' the definition includes both transactional and non-transactional customer activities.

2.4.8.3 Customer value metrics

In accepting the importance of customer engagement and the impact of non-transactional motivational drivers, Kumar *et al.* (2010:298) extended the range of customer value metrics from the traditional customer transaction value metric, customer life cycle value (CLV), and introduced customer engagement value (CEV). The CEV metric consists of three non-transactional values: customer referral value (CRV), customer influence value (CIV) and customer knowledge value (CKV). The researchers conclude, "One could argue that CLV should be an umbrella metric that can be decomposed into value derived from transactional and non-transactional components " (Kumar *et al.*, 2010:299).

Venkatesan *et al.* (2018:54) are not perturbed by the various definitions and interpretations of customer engagement in marketing literature. These researchers state that at the core of all definitions and approaches is a common denominator, the customer, a valuable asset to an organisation in many ways, even from a non-transactional perspective.

2.4.8.4 Emotional connection with customer

Pansari and Kumar (2017:300) state that relationship marketing forms the foundation for the engagement theory. Customers migrate from a single transaction, satisfied that their needs, wants, and expectations are met through positive experiences, to repeat purchases. Repeat purchases lead to an emotional connectedness between the customers and the organisations, resulting in customer engagement (Pansari & Kumar, 2017:300).

The engagement stage in the relationship is developed over some time. It differs from customer to customer and depends on the customers' experience with the business entity (Pansari & Kumar, 2018:9). While relationship marketing focuses on a customer's economic contribution, Harmeling *et al.* (2018:308) state that engagement marketing focuses beyond a customers' transactional financial value and view the customer as a possessing resource that is desirable and otherwise unattainable to the firm. Hollebeek (2013:17) states customers are "initiative-taking participants in interactive, value-generating co-creation processes".

2.4.8.5 Positive customer experiences

At the root of engagement lies positive customer experiences, as illustrated by Pansari and Kumar's (2018:4) conceptual framework and theory of CE (Figure 2:-12). The CE theory revolves

around the link between customer satisfaction and direct purchases (“direct contribution”) and the link between emotional connectiveness and customer referrals, customer influence, and customer feedback (“indirect contribution”). These relationships, however, depend on a variety of factors such as: “type of industry (service vs product), type of firm (B2B vs B2C), level of involvement, brand value, and convenience level” (Pansari & Kumar, 2018:10).

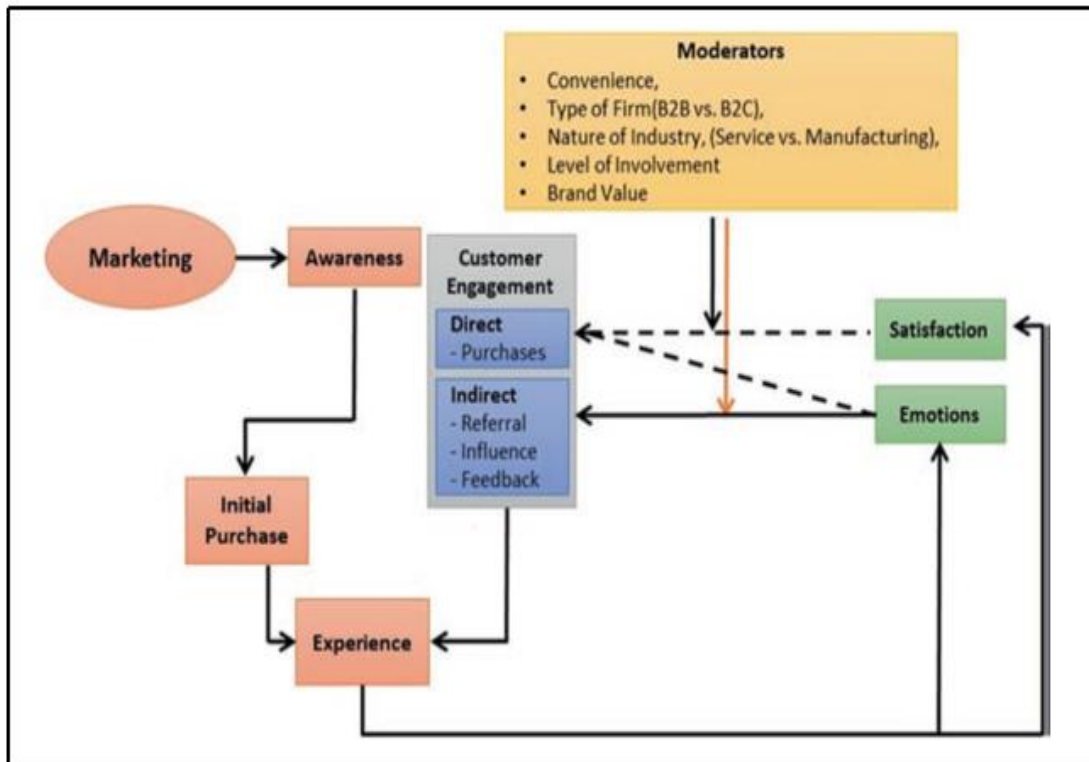


Figure 2-12: Conceptual framework of customer engagement

Source: Pansari & Kumar (2018:9)

Customer experiences, through the different stages of the customer journey (pre-purchase, purchase, and post-purchase) and through the different components of CE (CLV, CRV, CIV, and CKV), would vary for individual customers (Panasari & Kumar, 2018:17). In achieving customer engagement and in utilising engagement-based metrics, organisations, should be able to gauge the various levels of customer experience. They should then make more appropriate and effective decisions leading to the optimal allocation of resources based on customers' direct and indirect value contributions (Venkatesan *et al.*, 2018:60).

Organisations making provision for customer preferences through customising experiences should be more successful in achieving high levels of customer engagement (Panasari & Kumar,

2018:17). They further suggest that success also depends on the level of alignment between organisational customisations and personalisation strategies and “customer characteristics, levels of familiarity and levels of trust” in the customer-organisation relationship.

2.5 CUSTOMER EXPERIENCE AND RELATED THEORIES- SUMMARISED

Lemon and Verhoef (2016:73) contextualise the antecedents of customer experience, as rooted in earlier theories, by grouping theories that focus on specific identifiable themes. From these themes, three distinct customer experience research areas are defined:

1. Theories related to consumer buying behaviour, CRM, and customer engagement, emphasising aspects such as process, behaviour, and derived value creation, contribute to the premise that customer experience results from a customer’s purchase journey. The emphasis on processes, and not arbitrary actions, supports the notion that customer experiences can be shaped through staged customer journeys designed for the different organisational customer touch points. The more recent customer engagement theory also stresses the opportunity for customers to become actively involved in creating customer experiences in a co-creator fashion (Hollebeek, 2013:17).
2. Theories focus on satisfaction, loyalty, service quality, and relationships related to sought-after outcomes associated with introducing customer experience processes. Some of these outcomes are regarded as components (satisfaction), some as antecedents (service quality), and others (trust and commitment) as influencers of customer experience. These behavioural outcomes of experiences emphasise the importance and need for customer experience measurements.
3. The third area deals with the cluster of customer-centricity theories. These theories assist in identifying how organisations can manage customer experience, internally and externally, by focusing on internal organisational capabilities and stakeholder management.

The contributions from the illustrated antecedent’s theories to defining, understanding and managing customer experience are summarised in Table 2-3, adapted from Lemon and Verhoef (2016:75).

Table 2-3: A historical perspective: contributions to customer experience

Historical Perspective: Contributions to Customer Experience (CE)			
Time Frame	Topic Area	Representative Articles	Contribution to Customer Experience
1950s	Customer orientation	Drucker (1956:34); Abbott (1955:39); Ansoff (1957:114); Rosenborough and Riesman (1955) in Liverant (2018:192); Beckman (1957:7); Holbrook (1999:9).	• Focus on customer • Customer needs and wants • Importance of intangibles • Behavioural revolution
1960s	Customer buying behaviour: process models	Levitt (1960:53); Howard and Sheth (1969:471); Kotler and Levy (1969b:15); Holbrook (1982:136); Ross (1993:99); Gummesson (1995:250); Holbrook (1999:3); Lemon and Verhoef (2016:71).	• Customer buying behaviour path • Customer rational, motivational, cognitive behavioural objectives - broad, experiential focus • Multi-attribute attitude models and conceptual linkage models • Considered CE and customer decision-making as a process
1970s	Relationship development (Customer satisfaction and Loyalty)	Dwyer <i>et al.</i> (1969:21); Howard and Sheth (1969:11); Bagozzi (1975:32); Scanzoni (1979:61-98); Mattila (2005:97); Lemon and Verhoef (2016:71).	• Identified key metrics regarding overall CE assessment • Customer relationship development as CE cornerstone • Empirical linkage models to identify key drivers • Assessed and evaluated customer perceptions and attitudes about an experience
1980s	Service marketing (service quality)	Parasuraman <i>et al.</i> (1985:41-42; 1988:12-40); Zeithaml (1988:2-4); Dwyer <i>et al.</i> (1987:11-27); Galloway (1996:22-29); Zeithaml and Bitner (2003:3-11); Mattila (2005:97); Huo and Hong (2013:40); Lemon and Verhoef (2016:72).	• Quality involves outcomes and processes • Service management and quality • Attitudinal and cognitive value judgements • SERVQUAL model inputs into CE Incorporated atmospherics and environment

Historical Perspective: Contributions to Customer Experience (CE)			
Time Frame	Topic Area	Representative Articles	Contribution to Customer Experience
			• Early journey mapping through service management parameters • Identified the specific context and elements of the CE
1990s	Relationship marketing	Dwyer <i>et al.</i> (1987:11-15); Berry (1995:236); Sheth and Partiyar (1995:225); Grönroos (1996:7-11); Holbrook (1999:9); Bagozzi <i>et al.</i> (1999:202); Ballantyne <i>et al.</i> (2003:160); Vargo and Lusch (2004:5).	• Expanded to B2B contexts • Identified key attitudinal drivers • Customisation and value-adds to individual customers • Broaden scope beyond 4 P's of marketing • Identified key strategic and tactical drivers supporting CE • Service dominance logic applicable to CE journeys
2000s	Customer relationship management	Grönroos (1996:7); Parvatiyar and Sheth (2001:6); Ballantyne <i>et al.</i> (2003:161); Buttle (2004:(x)); Payne and Frow (2005:177); Kumar and Reinartz (2018:5).	• Enabled return-on-investment assessment • Customer relationship economics, data-driven • Identification of key touch points and drivers • Cross-functional integration, incorporated multichannel aspects • Identified how specific elements of the CE influence each other and business outcomes
2000s	Customer centricity and customer focus	Sheth <i>et al.</i> (2000:55); Gulati and Oldroyd (2005:92-95); Lemon and Verhoef (2016:73); Kumar and Reinartz (2018:6).	• Individual customer perspectives throughout organisation • Embedded the customer and customer data deeper into the organisation • Focused on redesigning CE from a customer perspective

Historical Perspective: Contributions to Customer Experience (CE)			
Time Frame	Topic Area	Representative Articles	Contribution to Customer Experience
			Premium on the understanding and influencing of customer behaviour
2010s	Customer engagement	Van Doorn <i>et al.</i> (2010:254); Kumar <i>et al.</i> (2010:16); Libai <i>et al.</i> (2010:268); Brodie <i>et al.</i> (2011:6); Vivek <i>et al.</i> (2012:133); Brodie <i>et al.</i> (2013:107); Kumar <i>et al.</i> (2013:198); Pansari & Kumar (2018:9). Hollebeek <i>et al.</i> (2014:150-151).	- Behavioural construct extending to non-purchase transactions - Engagement increases as the value of experience exceeds level of effort. - Incorporated positive and negative attitudes, emotions, and behaviours - Non-customers affected by customer's experiences (C2C) - Engagement occurs after multiple transactions depending on customer experience - Recognized the customer's role in the experience - Social experience - Emphasis on participation and connection - Engagement be a multidimensional—cognitive, emotional, and behavioural concept with customer experience as conceptual foundational. - A motivational state through interactive, co-creative customer - Interactive experience symbolises engagement

Source: Adapted from Lemon & Verhoef (2016:75)

2.6 CONCLUSION

A clear and comprehensive understanding of customer behaviour remains a moving target. The search for the one 'silver bullet' to conquer the customer, ensure sustainable business returns

and create a competitive market advantage seems to be an ever-evading target. As illustrated in the above literary review, the moving target phenomena are clearly visible from evolutionary developments in important marketing and customer-focused theories.

In considering the developments in marketing science across several decades, it is difficult not to conclude that though the search for a competitive customer-focused advantage has grown and advanced over time, little evidence exists of the formulation of a 'Nobel-price' competitive-advantage-theory breakthrough in marketing science. Justifiably so as the moving target, the customer, behaviour, needs, wants and preferences and other stakeholders, such as shareholders, remain critical variables in the marketing equation. These entities function in a macro environment that is challenged by ongoing human behaviour, communication, and technological advances, an environment where change is the only constant.

As researchers present the next new hype or discovery in customer marketing development over time, this study postulates that it most probably followed a typical evolutionary research process. This observation can be equated to what Frye (cited by MacDonald, 1979) remarks about literature not reflecting life but growing primarily from previous works of literature not referring to "the local or temporal as to the universal, especially toward humane possibilities which are never fully realised". In this context, it is posited that customer marketing continuously exhumes past recognisable concepts, constructs, philosophies, and methodologies, then consolidates, redefines, aligns, delineates in more detail, elaborates, renames, and then presents, for example, customer experience as a breakthrough in marketing thinking.

Metaphorically speaking, marketing constructs, themes, concepts, theories, and philosophies resemble some marketing "broth". As researchers rediscover or re-ignite subdued or previously submerged constructs, they dip their research tools deeper into the "broth". They scoop and extract the already known but not fully exposed or explored constructs and develop "old-new" theories and philosophies around the newly researched and formulated fundamentals of such renowned constructs (Berry, 1995:236). The risk in such an approach is articulated by Abrahams (1986:48) as follows: "We so love our new holy words that we turn them into clichés and commonplace, forgetting for the moments that we must maintain their spirits as well as their meanings."

From the preceding literature study, one such "new-old" construct seems to be 'customer experience'. This construct, highlighted in the 1950s, was ever since the present but mostly obscured in most of the later theories on customer behaviour (Abbot, 1955:40). It was not fully recognised as a distinct, clearly defined and explained customer-focused construct. This is, however, until the recent re-emphasis of the importance of inter-alia, the emotional aspects of

customer decision-making and experience. Infused in earlier theories, and what surfaces more prominently in recent theories such as customer engagement, are the antecedents for the more recent development, understanding and management of the customer experience construct.

The developments and contributions of customer-related marketing theories over decades illustrate the need to consider, on a much more in-depth and comprehensive basis, customer buying behaviour from a customer's experience, and specifically from a customer experience at retail touchpoints or viewpoints. Especially in light of Caru and Cova's (2003:268) comment, the customer experience approach is still not adequately defined and remains ideologically linked to the concept of relationship only.

An analysis of the interconnecting marketing theory antecedents of customer experience provides an important basis for understanding the foundations and evolutionary development of what is referred to by researchers as the 'customer experience philosophy' (Malthouse & Calder, 2011:277). However, researchers such as Caru and Cova (2003:268), Johnston and Kong (2011:2) and Klaus *et al.* (2012:1) still highlight the need for more clarity on the definition of customer experience and the need for guiding principles as to what customer experience presents in practice.

The quest for clarity on a too narrowly defined concept such as customer experience compels this study to challenge Zeithaml *et al.* (2020) criticism of extending theories by borrowing from allied disciplines. This study considers a variety of customer experience definitions and integrates the philosophy with service design and customer journeys to "make a significant difference in the lives of managers, public policy officials, and consumers", as called for by Zeithaml *et al.* (2020:32).

The following chapter, Chapter 3, provides the basis for an integrated approach through detailed insights into various customer experience definitions within marketing theory. The chapter aims to suggest a consolidated, all-encompassing definition of customer experience that provides the opportunity to create, stage, or engineer customer experiences (Carbone & Haeckel, 1994:8-19) through the application of service design principles, as discussed in Chapter 4. It also provides the basis for applying customer journeys as a customer experience enabling tool, as called for by Johnston and Kong (2011:2), culminating into a purposefully designed retail store service system and a self-correcting continuum of distinct retail store constructs as proposed in Chapter 5.

CHAPTER 3 ANALYSIS OF THE CUSTOMER EXPERIENCE PHILOSOPHY

3.1 INTRODUCTION

The previous chapter reviewed the relevant literature on the evolutionary development of the customer experience construct since the 1950s. The analyses served as an important basis for understanding the roots of the construct. It also laid the foundation to further explore, in more detail, the experience construct still shrouded in a cloud of debate and uncertainty (Klaus *et al.*, 2012:1; Keiningham *et al.*, 2020:432;).

This chapter extends Chapter 2, focusing on the first of three first-order resource pillars supporting the conceptual comprehensive customer-centric management framework for an in-store customer experience journey. The first pillar represents the customer experience philosophy, as illustrated in Figure 3-1. The chapter examines challenges to the traditional marketing definition, the notion of experience in non-management sciences, the notion of experience in management and marketing sciences, the conceptual domain of customer experience, and the variety of customer experience definitions from marketing science literature. It concludes with a proposed integrative representative and all-encompassing customer experience definition that supports the holistic nature of the construct as reflected in research studies.

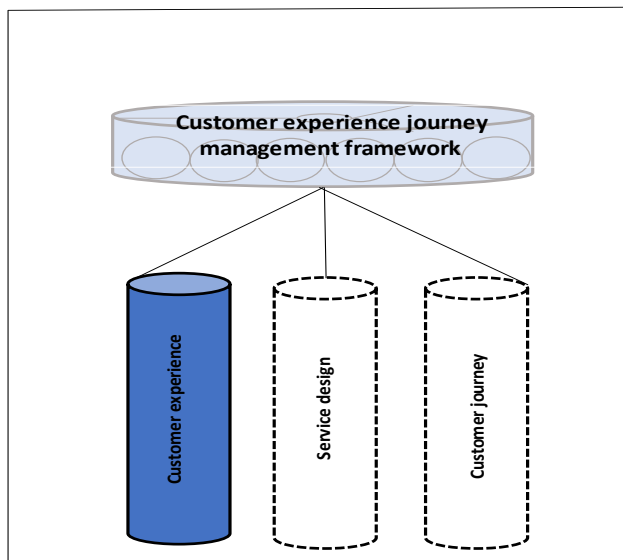


Figure 3-1: Conceptual customer-centric experience journey management framework

3.2 CHALLENGING THE TRADITIONAL MARKETING DEFINITION PERSPECTIVE

Defining the customer experience construct, exploring customer journey methodologies and service system design practices as developmental tools for customer-centric experience management frameworks should be assessed against a long-standing challenge issued to traditionalist marketing practitioners by researchers Kotler and Levy (1969a:55).

Challenging the traditional marketing definition and calling for “broadening the concept of marketing”, Kotler and Levy (1969a:55) were met with resistance from other marketing practitioners and researchers. Some adversaries argued that expanding the traditional view to enable marketing to embrace more than just the processes resulting in business transactions (“purchase-and-sale of a product or service”) would distract from the profit-motive inherited in business activities (Luck, 1969:54).

In defending the call for expanding the marketing definition, Kotler and Levy (1969a:55) postulate that disciplines, in general, are determined by tradition. In the developing marketing world, it is common to question the relevancy of traditions, disciplines, and definitions. The merit and success of any challenge lie in the validation, acceptance, and ability to influence a new standpoint. It is in this regard that Martínez-Ruiz *et al.* (2018:7) reminded marketing scholars of the evolutionary phases in marketing: Marketing 1.0 - the focus on the product; Marketing 2.0 - the focus on the customer; Marketing 3.0 - the focus on the customer values (social, spiritual, ethical, etc.); and the dawn of Marketing 4.0 in which the role of connectivity and technology will impact on consumer behaviour.

It can be argued that each of these generational or evolutionary phases brings ‘new’ marketing constructs to the fore, defined in the milieu of a particular marketing phase. Efforts by researchers to accurately capture the gist of such constructs within a developing discipline in a clear, concise definition accepted by all are mostly unsuccessful (Johnston & Kong, 2011:2; Klaus *et al.*, 2012:1). Thus, multiple definitions confront scholars and practitioners, some circular, others with little guidance as to clarify and support the application there-off in the marketplace adequately (Pullman & Gross, 2004:553). The customer experience philosophy and construct, the customer journey methodology, and the application of service system flow design in retail are not unfamiliar with the phenomenon of multiple definitions and circularity (Keiningham *et al.*, 2020:439).

Before defining and discussing the three mentioned concepts, which form the nucleus of the conceptual customer-centric experience management framework, it is important to provide a foundation by examining the ‘notion of experience’. This foundation is also important when defining and describing the twelve constructs associated with the management framework, as

depicted in Chapter 1, Figure 1-5. The 'notion of experience' is key to understanding customer behaviours, consumer economies and marketing in general (Carù & Cova, 2003:268).

3.3 THE NOTION OF EXPERIENCE IN NON-MANAGEMENT SCIENCES

Pullman and Gross's (2004:553) statement about the diversity of customer experience definitions has its root in the all-encompassing word 'experience'. This word, phrase, or construct means different things in different sciences. Carù and Cova (2003:269) concur with this statement by referring to the 'notion of experience' as being described in the *Encyclopaedia Universalis* and points out that:

- Experience is a spontaneous test involving an action to receive and to accept.
- Experience implies learning a lesson from the test.
- Experience implies that the learning will result in a behavioural change.
- Experience implies that something is to be gained from the test: "Experience is the best teacher".

Carù and Cova (2003:269), in deciphering and interpreting the notion of experience, as described in the *Encyclopaedia Universalis*, also refer to definitions of experience as formulated in non-management sciences and conclude: "each scientific discipline has derived its conception adding to a range of meanings which is already disordered."

This researcher deems it prudent to consider these non-management meanings as stated by Carù and Cova (2003:269), though regarded as "disordered". It presents informative insights into the notion of experience within management and marketing sciences and this study's conceptual customer-centric experience management framework:

- **In science**, an experience is equated to an experiment grounded in unbiased facts and data that can be generalised and provide universal common knowledge to all.
- **In philosophy**, an experience refers to an individualised trial or test that has the potential to transform an individual and translate into the accumulation of personal knowledge about the self. Thus, this knowledge only applies to the particular individual and not as per a scientific experience as a universal knowledge to all.
- **In sociology and psychology**, an experience relates to an activity of personal and mental nature, which is important to an individual's development. These activities require a

personal involvement in which an individual tries to create a reality and to authenticate such a reality.

- **In anthropology and ethnology**, an experience relates to how individuals live and operate within their own cultures. In this context, an experience is twofold; first, it represents the power of one's beliefs and feelings derived from everyday life, and second, it provides a referencing framework within which an activity can be translated and narrated into a reportable story. It is from this story that researchers endeavour to gauge, interpret, and translate individual experiences.

Management and marketing sciences did not evolve in a vacuum but amidst developments in various non-management sciences. Thus, it should not be unexpected if management and marketing sciences link with notions of experience as contained in non-management sciences. This is positive as researchers highlight the need to bridge different theoretical lenses, build on multiple overarching approaches and generate new insights, especially if there are phenomena proximity and underlying assumption congruence (Michailova, S., 2024:18; Okhuysen & Bonardi, 2011:7).

This cross-pollination from other sciences, where the meaning of experience is regarded as “disordered”, might be complicit in giving rise to a multiplexity of meanings of experience within the management and marketing sciences (Carù & Cova, 2003:269; Pullman & Gross, 2004:553). It is thus practical to provide some context regarding the notion of experience as being presented in management and marketing sciences.

3.4 THE NOTION OF EXPERIENCE IN MANAGEMENT AND MARKETING SCIENCES

Considering the various meanings of ‘experience’ encountered in non-management sciences, it is comprehensible that customer experience is one of the constructs that Pullman and Gross (2004:553) refer to as “various researchers define the construct in various ways”. The concern and risk associated with multiple definitions of any construct is that it endangers the construct of being dismissed due to the confusing way it has been defined and applied (Hirsch & Levin, 1999:205; Palmer, 2010:196).

Efforts by researchers and scholars in marketing and management sciences to reach a unified definition, conceptualisation and understanding of the intricacies of customer experience resulted in a consensus among most. There is no consensus about the customer experience construct and its definitions (Jain *et al.*, 2017:643). Though researchers and marketing practitioners agree on the importance of customer experience, they have different views on how it should be defined

and described (Helkkula, 2011:367). Endeavours to at least find a theoretical “home” for the construct lead it to be categorised under constructs defined as “umbrella constructs” (Hirsch & Levin, 1999:199).

3.4.1 Customer experience - an umbrella construct in an emerging excitement stage

Kranzbühler *et al.* (2018:436) to circumscribe the boundaries of the customer experience construct, agree with Jain *et al.* (2017:643) and categorise the construct under a cluster of constructs defined by Hirsch and Levin (1999:199) as the “umbrella constructs”.

Hirsch and Levin, in their research on organisational science, were confronted with a variety and diversity of constructs and frameworks and endeavoured to identify a single perspective, label, and category under which to classify the non-consensus constructs. The researchers labelled this category as “umbrella constructs, providing for constructs in fields that lack theoretical consensus, which are broad, account for a diverse set of phenomena, and are linked together by different research elements. To facilitate the study of the origin, maturity and decline of such umbrella constructs, the researchers propose an evolutionary life-cycle pattern of constructs (Hirsch & Levin, 1999:199). This life cycle is illustrated in Figure 3-2.

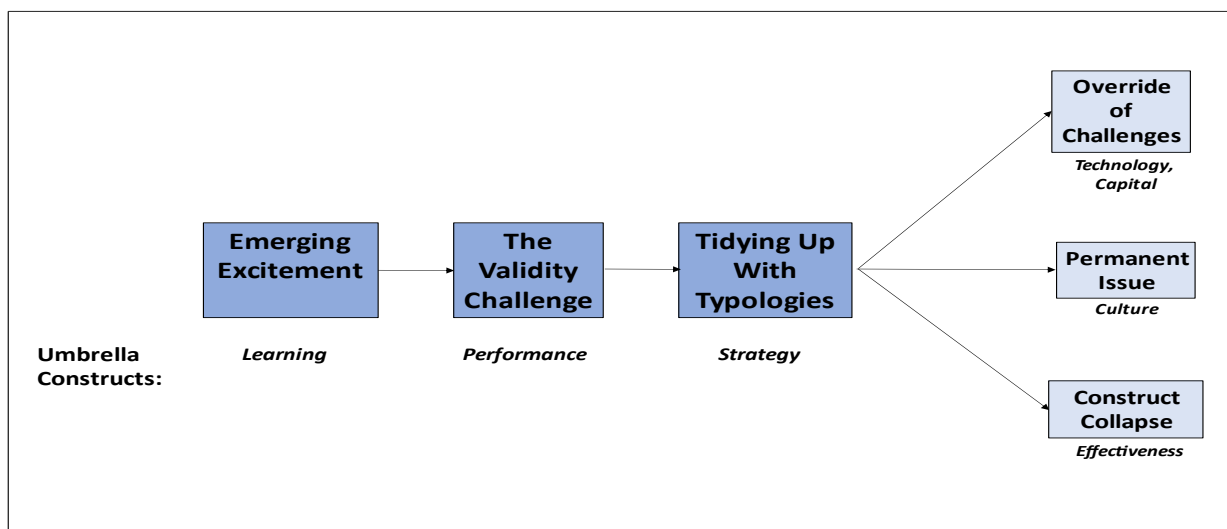


Figure 3-2: Evolutionary life cycle of umbrella constructs

Source: Hirsch & Levin, 1999:205

Kranzbühler *et al.* (2018:436) propose that the customer experience construct resorts under the first stage, “emerging excitement”, of Hirsch and Levin’s life-cycle model. This learning stage is followed by a validity challenge and a final stage where the construct is refined through typologies.

The final stage provides for three different options: the construct becomes coherent, scholars agree to disagree on its definition, or they call for its demise (Hirsch & Levin, 1999:205).

Verhoef *et al.* (2009:33) acknowledge and endorse the umbrella status of the customer experience construct, calling for researchers to look beyond retail elements only. They should also focus on those elements outside the retailers' control. To not only focus on cognitive and affective evaluations but also include social and physical elements when considering a customer's experience (Verhoef *et al.*, 2009:33). The researchers call for a broader conceptualisation of the customer experience construct (Verhoef *et al.*, 2009:33, 35).

3.4.2 Ambiguity associated with the conceptualisation of customer experience

Endorsing a broader conceptualisation of promoting a deeper understanding of the construct and how it influences customer behaviour can lead to a further lack of clarity and disagreements among researchers. Tynan and McKechnie (2009:502) state that different interpretations can result in disagreements on conceptualising the construct towards a more comprehensive understanding. They, in particular, draw attention to the word 'experience' that can be used as a noun or verb, stating that the phrase alludes to a process involving an activity that prompts an active or passive reaction in the senses or mind of a customer. They further argue that it is unclear whether 'to experience' must always result in particular outcomes or whether it requires any interaction (Tynan & McKechnie, 2009:502).

The differences in the conceptualisations of experience may be due to the variety of settings in which experiences can be experienced (Chaney *et al.*, 2018:410). The call for a broader conceptualisation led researchers to a variety of contexts when referring to 'experience', resulting in a collection of different experience-orientated constructs, each emphasising specific content and particularity (De Keyser, 2015:16). Chaney *et al.* (2018:410) postulate that using a variety of descriptions for one construct, such as brand experience, service experience, retail experience, consumption experience, retail brand experience, and aesthetic experience might be the reason why some market practitioners believe that research into the experience construct is inconsistent and contradictory.

Becker and Jaakkola (2020:631) concur with Chaney *et al.* and, through their research, illustrate the inconsistencies as to what customer experience means to whom. In delineating the construct, Becker and Jaakkola (2020:631) refer to a school of thought that argues that the construct reflects the products and services companies offer. Some researchers, they assert, restrict the scope of the construct to a specific situation, such as service encounters, while others propagate that experience is an all-encompassing construct emerging in customers' lifeworld's.

Reference is also made to the construct when covering types of customer responses to interactions with companies and defining experiences as extraordinary or ordinary. In this context, De Keyser (2015:18) identifies the “distinctiveness” properties of the construct by contrasting routine everyday activities with extraordinary incidences of surprise and joy associated with experiential activities. In considering the types of experiences Bhattacharjee and Mogilner (2014:2) suggest an ordinary-extraordinary dimension in the pursuit of experiences that contribute to different levels of happy experiences.

Chaney *et al.* (2018:408) ascribe the ambiguity surrounding the conceptualisation of customer experience to differences in emphases, opinions, or specifically defined research preferences. It might also be because marketing researchers approach the construct from different disciplines or with a focus on different constituents of selected disciplines. Helkkula (2010:375), for example, refers to service experience as a “phenomenon”. Drotskie (2009:8) regards customer experience as part of the services marketing field of study. Lemon and Verhoef (2016:69) identify it as a subset of customer management, while Thompson *et al.* (1989:133-146) regard it as part of complex customer behaviour. Keyser (2015:14), on the other hand, supports Carù and Cova (2003:269) and identifies, discusses, and points to the interdisciplinary roots of philosophy, psychology, and sociology depicted in the customer experience construct.

Keiningham *et al.* (2020:432) add to the debate and suggest three basic tenets of customer experience. It is interactional, suggesting that it always stems from an “interaction between a customer and a (set of) market actor(s) through various interfaces, both human (e.g., frontline employees) and non-human (e.g., self-service technologies)”. The second basic tenet suggests that every customer experience holds a specific level of uniqueness, and the third basic tenet relates to the multidimensional nature of customer experience.

These mentioned differences in interpretation, context, emphases, opinions, research agendas, distinctive properties and scope definitions result in the ambiguity surrounding the conceptualisation of customer experience. This ambiguity in conceptualisation, stretching over several decades, forced Schmitt (2011:70) to express the urgent need to conceptualise experiences along various experience dimensions, including sensory-affective, cognitive-intellectual and behaviour and action-orientated components. It compels Scott (2016:17) to call for a conceptual integration of the construct so it does not become irrelevant, obsolete, declared a fad and disappear from the marketing sciences radar (Hirsch & Levin, 1999:205).

3.4.3 Customer experience remains a key marketing concept

Regardless of the angle from which researchers view the construct, customer experience remains a key marketing concept amidst challenges of fragmentation and theoretical confusion (Becker & Jaakkola, 2020:630; Helkkula, 2011:367; Keiningham *et al.*, 2020:437). It remains important to the marketing and management sciences to mitigate some of the theoretical and methodological challenges associated with the construct and strive towards a more unified and integrative view through a more precise conceptualisation (Chaney, 2018:408).

It is not the objective and purpose of this study to provide a fully unified and integrative view of the construct, as called for by Chaney (2018:408), but rather to sketch a conceptual domain of customer experience within which the conceptual customer-centric experience management framework resides. This reduces the ambiguity surrounding the construct and provides some conceptual integration (Scott, 2016:17) within broadly defined boundaries, underlining the construct's continued relevancy in modern marketing sciences (Hirsch & Levin, 1999:205).

3.5 CONCEPTUAL DOMAIN OF CUSTOMER EXPERIENCE

The notion in management and marketing science circles that customer experience is a broadly defined construct, comprises a diverse set of phenomena tied together by multiple elements, provides for some uncertainty when trying to accurately conceptualise the construct (Hirsch & Levin, 1999:205; Kranzbühler *et al.*, 2018:436; Verhoef *et al.*, 2009:33).

Not only is there no absolute clarity as to the literature field or grouping of fields the construct belongs to, but there is also uncertainty as to what metatheoretical assumptions should apply, what the nature of the construct is, and what goals are being aspired to with the customer experience phenomena (Becker & Jaakkola, 2020:631, 635).

Lemon and Verhoef (2016:69) acknowledge that developing a complete understanding of customer experience remains challenging as it is intertwined with the elusiveness and unpredictability of human (customer) behaviour. The construct should be considered, defined, and evaluated not only against the unpredictability of customer behaviour but should find substance in its foundational roots, as reviewed in Chapter 2, and what in literature is generally referred to as the application of an ecosystem view or analogy (Vargo, 2009:377).

3.5.1 Application of an ecosystem analogy

The relevancy in considering the conceptuality of the customer experience construct within an ecosystem analogy lies in the characteristics associated with an ecosystem. These

characteristics relate to a collection of multiple interactive, dynamic co-evolving communities creating value through sophisticated collaboration models (Cucinotta, 2018:16).

Applying an ecosystem analogy provides insight into the phenomenological conceptualizations of experience and how its contexts are formed and sheds light on other marketing ecosystems impacting the customer experience ecosystem (Akaka & Vargo, 2015:459). Through the application of the ecosystem analogy, different types of structures and processes can be described to aid the understanding of a system, the principles of its formation and interdependences (Peltoniemi & Vuori, 2004:12, 13).

In applying a systems-based approach, a more comprehensive understanding of the context of services, the customer experience construct can be identified using the ecosystem analogy. It also contributes to identifying and explaining the constructs' position within "porous boundaries" between customer experience, the service context and the service ecosystem, illuminates the potential tensions and synergies with other marketing concepts and ecosystems as well as identifies the values, needs, and desires of role-players functioning within the ecosystems (Akaka & Vargo, 2015:453; Bhattacharya & Korschun, 2008:113).

3.5.2 The service context and the service ecosystem

Kotler and Levy's (1969a:55) bold statement to broaden the marketing concept undoubtedly impeded other marketing scholars from questioning and critically re-evaluating the traditional marketing definition. Shostack (1977:73) argues that the conceptual boundaries of marketing should be expanded to include the concept of intangibles. Webster (1992:10) calls for expanding marketing beyond the "conceptual framework of microeconomics" of transactional profit-maximisation through a product. Shostack (1977:73) thinks that marketing requires a more comprehensive framework where the concept of service is conceptually equally weighted as a product.

Gummesson (1995:250) agrees with Shostack's call to value the concept of service as an equal to product. The researcher, however, approaches the matter from an alternate angle and proclaims that the traditional separation between product and service is obsolete and encourages a customer perspective on service. He states that customers are interested in "offerings", not goods or services. To these customers, offerings, whether activities and things, represent consumable services that add value to their lives. The plea from marketing scholars to advance the importance of services compels Sheth and Parvatiyar (2000:140) to summon the inclusion of the exchange theory so services can also be grounded and guided by relationship creation among all marketing actors.

The services context can conceptually be extended by applying a service-ecosystem perspective that promotes a systematic approach grounded in the evolving service-dominant logic (S-D Logic) (Akaka & Vargo, 2015:454). The service-ecosystem perspective allows for a more comprehensive conceptualisation of service context that proposes that services reside within a “complex and dynamic social and economic system composed of networks of actors and the institutions that guide them” (Akaka & Vargo, 2015:456,460).

The S-D Logic and services marketing function as cornerstones of the service ecosystem. The elements associated with each also impact other neighbouring ecosystems, such as the customer and customer experience ecosystems within the marketing sciences discipline.

3.5.2.1 Services marketing and the service-dominant logic

The renewed focus on an elevation in the importance of marketing elements and constructs such as customer expectations, intangibles, consumption, relationships, and value creation are what Gummesson defines as moving away from a producer perspective and culminating into a “shift in focus to services” (Gummesson, 1995:251). This researcher posits that this is what advocates for a broader perspective on marketing as it formally introduces a new marketing subdiscipline, “services marketing”, and defines and formalises a new ecosystem within marketing, the service ecosystem (Vargo & Lusch, 2004:1).

Services marketing is the result of the evolutionary development of marketing from a focus on tangible goods towards a focus on services where knowledge, skills, and exchange processes where relationships are key (Vargo & Lusch, 2004:2). Within this framework, they define services as “the application of specialized competences (knowledge and skills) through deeds, processes, and performances for the benefit of another entity or the entity itself” (Vargo & Lusch, 2004:2). It is this concept of services that forms the cornerstone of the S-D logic as defined by Vargo and Lusch.

Vargo and Lusch (2004:6-12; 2008:7) summarise the basic premises for a service-dominant logic, which is at the core of the service ecosystem, into the following fundamental points:

1. The basic unit of exchange between parties is inherently the application of specialised knowledge and skills for the reciprocal benefit of participating parties. The unequal distribution of physical and mental skills in society necessitates specialisation and exchanges (skills-for-skills) thereof between parties or entities. Through exchanges, parties participate in processes of total service provision to obtain utility and cater to one another’s needs and wants. These

exchanges occur where parties use their competencies (knowledge and skills) to benefit each other (Vargo & Lusch, 2010:172).

2. The basic unit of exchange can become disguised into several indirect exchanges. As economies expand and grow, exchange processes become more monetised, sophisticated, and less visible. Direct skills-for-skills or service-for-service exchanges became indirect, while elements of exchange that participate in the exchange process (mediums of exchange) increased in prominence, masking the exchange processes.
3. Though tangible goods are elements of economic exchange, they only represent the application of specialised skills, knowledge, and labour. Goods are thus exchanged mediums for the provision of services and are obtained and used for their intrinsic service value.
4. Companies' strategic benefits reside not in operand (tangible) resources but in operant (intangible) resources such as human skills, knowledge bases and process management capabilities.
5. Changing human needs and wants force companies to constantly adapt their economic activities by refining and exchanging their operant resources to serve and comply with changing service requirements, implying that all economies are service economies. "Virtually all the activities performed today have always been performed in some manner; however, they have become increasingly separated into specialities and exchanged in the market" (Vargo & Lusch, 2004:10).
6. In serving and complying with changing customer requirements, the customer and all stakeholders become co-creators of services and value.
7. Value is determined through consumption. If products or services are not being consumed or used, there can be no value creation, only the potential for value creation. Customers, therefore, determine the value and not the stakeholders. Stakeholders can only participate in creating and offering value propositions.
8. Beneficiary centrality and relationships are the cornerstones of a service-centered view. The service-centred view revolves around the beneficiary and the relationships among stakeholders involved in value creation.
9. Resource integration enables the co-creation of value through the knowledge and skills of all relevant stakeholders (actors) and requires the coordinated collaboration of activities between resource integrators to obtain the desired value (Edvardsson *et al.*, 2014:292). From this

premise, Vargo and Lusch state that all social and economic actors are resource integrators (Vargo & Lusch, 2008:7).

10. Value is uniquely distinctive and experiential (Vargo & Lusch, 2008:7). This tenth premise of S-D Logic reiterates statements by Prahalad and Ramaswamy (2004:9) that customers unique experiences are what form their perceptions of value and these experiences cannot be commoditised as in the case with products. Akaka *et al.* (2015:454) concur but extend the context of experience to the involvement and influence of multiple role-players when defining and obtaining value.
11. The application of integrated resources to co-create value for the benefit of a beneficiary takes place in the context of institutions (rules, norms, beliefs) and institutional arrangements (sets of interrelated institutions) facilitating and restricting value creation (Vargo & Lusch, 2016:11, 18).

The service-dominant logic proposes a reconceptualization of the service concept and promotes a complete repositioning (Vargo & Lusch, 2014:239). It implies that, by primarily focusing on the customer (though multiple role-players are involved), it represents a continuous learning process in the application of intangible resources through relationships between all role-players to obtain a competitive advantage or strategic benefit (Vargo & Lusch, 2004:5; 2016:8). It furthermore implies that even organisational information infrastructures should be customer focussed with opportunities for co-creation experiences in the course of information searching, product and service developments, fulfilment, and consumption (Prahalad & Ramaswamy, 2004:11).

Positioned within the concept of an eco-system, Frow *et al.* (2014:328) state that the service dominant logic perspective takes on system attributes. This implies system self-adjustments after instances of service provision and value creation that can lead to modifications of the service system in anticipation of the next service iterations. Barari and Furrer (2018:235) concurs with these statements but submits that the service ecosystem adopts more of a network-oriented view of value creation, not a system-orientated one.

This network comprises multiple layers of stakeholders (micro, meso, and macro networks) impacting customer-organisation interactions and influencing the value creation process. Lusch and Vargo (2014:242) adopt both Frow *et al.* and Barari and Furrer's perspectives of eco-systems and define the service-ecosystem as a "relatively self-contained self-adjusting system of resource integrating actors connected by shared institutional logics and mutual value creation through service exchange".

3.5.2.2 The concept of value creation in service

A key element of the S-D Logic, as defined by Vargo and Lusch (2004:11; 2008:7), is the concept of value proposition. Considering the S-D Logic from a service ecosystem perspective aids a more thorough understanding of the value creation concept (Vargo & Lusch, 2010:169). This concept is not unknown to organisations, marketing scholars and practitioners, but its application is sometimes without a comprehensive understanding of its strategic foundations (Frow *et al.*, 2014:329). In this context, Frow *et al.* (2014:336) propose six metaphors to illustrate and clarify its characteristics and the relationship between stakeholders within the service ecosystem.

A value proposition that is co-created, reciprocal, and dynamic (Frow *et al.*, 2014:344) can be expressed as:

1. A promise is about the future potential value to a customer through any resource of an organisation, even if no interaction occurs (Grönroos, 2011:294). Organisations explicitly provide promises through various mediums to customers who might respond or not to the promise (Frow *et al.*, 2014:338).
2. A proposal is an offer of reciprocity from an organisation to a customer through which a customer can obtain value from an organisation's offering.
3. An invitation to interact is an invitation to a customer to engage and interactively collaborate with the organisation on its offerings.
4. A bridge connecting parties refers to the needs and wants of a customer, the buyer, on the one side being met potentially by an offering from an organisation, the provider.
5. A wild card has the potential to influence relational and resource elements of the service ecosystem. This might impact the structure of the ecosystem, might offer new opportunities with beneficial outcomes, and suggest a collaboration between parties. This desired state can only be achieved through collaboration, with the value proposition setting out the potential opportunities within the ecosystem.
6. A journey to a destination is where the value proposition serves as a guiding road map on how parties within the service ecosystem can, through a process of knowledge sharing, dialogue, and collaboration, each reach a beneficial (value) outcome, should they successfully embark on the journey.

The shift in focus to services (Gummesson,1995:251) with the evolvement of services marketing, the new marketing subdiscipline (Vargo & Lusch, 2004:2), rooted in the S-D Logic (Vargo & Lusch, 2014:239), and positioned within a broadly defined service ecosystem (Vargo & Lusch, 2014:242) highlights the importance of a customer-centric and value creation focus within the services school of thought. Heinonen *et al.* (2010:534) concur with these focuses but define it more extensively in stating that the foundations of the S-D Logic revolve around three core subject matters: co-creation, value-in-use, and customer experience. Though these core subject matters are not mutually exclusive, this study focuses on the experiential nature of the S-D Logic and its role in and contribution to the customer experience ecosystem.

3.5.2.3 Service-dominant logic, service experience and the customer

Vargo and Lusch (2008:3) suggest that references to customer's wants, needs, expectations, and perceptions in the context of a service ecosystem imply that value is being defined and determined from an experiential perspective. This is stated by the tenth S-D Logic foundational premise (Vargo & Lusch, 2008:9). In evaluating and commenting on the initial S-D Logic foundational premises defined by Vargo and Lusch (2004:6-11), Schembri (2006:389) argues that the initial eight foundational premises are inadequate and incomplete and asserts that the customer should be the focal point of the logic. In this regard, the customer's experience should be central to S-D Logic's being regarded as the new service orientation within the marketing sciences (Schembri, 2006:390). Vargo and Lusch, in reviewing the initial eight foundational premises of S-D Logic, revisited and redefined some of the premises, provide more emphasis on a customer perspective and formulate two additional premises, of which the tenth premise reflects an experiential perspective (Vargo & Lusch, 2008:7).

Enriching the S-D Logic with the experiential and reflecting the customer as the focal point elevates the subject of service experience as a key concept in S-D Logic and declares this concept to be the heart of all service offerings (Helkkula, 2011:367,375). Helkkula maintains that though service experience is the basis of all business, the need exists for more meaningful research on the nature of the concept, especially if it falls within the domain of the customer experience ecosystem (Helkkula, 2011:367).

The lack of clarity on who experiences a service, who the direct and indirect role players involved in service experience, its scope, content, context and how the concept relates to other marketing concepts compelled Helkkula to embark on an extensive literature study of of three years (Helkkula, 2011:367). The purpose of the study was to provide more clarity on service experience through a review of the characteristics of the concept (Helkkula, 2011:384).

Based on an extensive literature review Helkkula (2011:370) identifies three characterisations or descriptions of the concept of service experience:

1. Phenomenological characterisations - Literature often refers to a service experience as a holistic phenomenon related to a specific individual's direct or indirect contact with a service provider. (Helkkula, 2011:370). The individualised experience is mostly internal, subjective, event-specific and context-specific, resulting from imaginary or real encounters between customers and service-provider agents. Though marketing literature focuses on hedonic services when referring to phenomenological service experiences, the experience can result from different service events or settings (Helkkula, 2011:375).
2. Process-based characterisations - The provisioning of a service typically consists of different components or elements organised in chronological order within different service settings. In acquiring the service, the customer would relate, connect, and interact with the different service stages, resulting in a variety of cognitive, emotional, and behavioural responses resulting in a service experience (Helkkula, 2011:376).
3. Outcome-based characterisations - Service experience is a measurable phenomenon manifesting in various outcomes such as satisfaction, service quality, relationship quality and perceived value, positing as a barometer of the customer's assessment of the service delivery. Experience is not the only outcome of a customer-service provider interaction or relationship but is one of the elements in a "model linking several variables or attributes to outcomes" (Helkkula, 2011:379). The outcome characteristic implies aggregated service experiences of more than one individual customer. The outcome-based characterisations usually focus on the immediate result rather than a longitudinal process. The context of service experience includes different kinds of service settings.

In considering the tenth foundational premise, the experiential, in the context of the bridge metaphor used by Frow *et al.* (2014:338), it stands to reason why Drotskie (2009:8) and Frow *et al.* (2014:330) argue that customer experience, the determinant of value and the bridge between customer and service provider, should form an integral part of the service ecosystem. This argument is supported by Shostack (1977:72), who declares that a service rendered is a service experienced.

Magnifying the customer, their experiences, and their role within the framework of the service ecosystem (Frow *et al.*, 2014:334) inevitably leads to and places the spotlight on another ecosystem that requires further exploration. This ecosystem also consists of three layers interrelated to the service ecosystem and is referred to as the customer experience ecosystem.

Within these two broadly defined ecosystems (service and customer experience ecosystems), a few important phrases provide an early indication of some of the important constituents of customer experience. These are “value creation”, “service exchange”, “set of relations”, and very importantly, “quality of all customer interactions” (Bodine & Hagen, 2013:7; Vargo & Lusch, 2016:11). These constituents were further enhanced by Barari and Furrer (2018:235) stating that research in the customer experience area can be categorised into three streams reflecting the outcome, internal organisation, and process perspectives.

3.5.3 Customer experience ecosystem

The service ecosystems’ primary focus is on the service provider, the service system and all role-players involved in creating value in the ecosystem (Heinonen *et al.*, 2010:532; Tynan *et al.*, 2014:1059). The ecosystem emphasizes co-creation and value-in-use. It also incorporates the aspect of experience as an element of the ecosystem but not as a primary focus of the ecosystem. Though the S-D Logic emphasises the role of the customer, it is predominantly from a co-creation and service from the service-provider-perspective and not from a Customer Logic (C-D Logic) perspective (Heinonen *et al.*, 2010:532). The latter perspective places the customer in the centre, not the service or service provider (Heinonen *et al.*, 2010:534). In this context, Schembri (2006:381) argues for a more in-depth understanding of services from a customer’s experience perspective, as effective marketing begins with the customer’s experience (Schembri, 2006:389).

The customer experience ecosystem is defined by Bodine and Hagen (2013:7) as “the complex set of relationships among an organisation’s employees, partners and customers that determines the quality of all customer interactions”. This ecosystem supports a more in-depth understanding of the customers’ service experience and the processes related to customer value-in-use (Heinonen *et al.*, 2010:533).

It also emphasises that those activities are not part of customer interactions but can influence customer interactions. Bodine and Hagen (2013:1) argue that every role-player, directly or indirectly, involved in the service process can influence customer interaction and that mutual relationships form the nucleus of the customer experience ecosystem. This ecosystem promotes a detailed understanding of customers’ activities, practices, experiences, and context to be incorporated into offerings aimed at the customer’s life. (Heinonen *et al.*, 2010:534).

In the service ecosystem, little attention is given to value creation from a customer’s perspective or from a perspective where a service provider does not feature prominently in pre- and post-transactional customer-company interactions (Barari & Furrer, 2018:236). Applying a Customer-Dominant (C-D) Logic perspective should assist in promoting a “more holistic understanding of

the customer's life, practices and experiences, in which service is naturally and inevitably embedded." (Heinonen *et al.*, 2010:533). This perspective places the emphasis more squarely on how value emerges for customers, not for service providers. It also sheds light on how customers create their experiences of value and how value co-creation takes place in a customer-focused ecosystem (Heinonen *et al.*, 2010:533). Developing and enabling customized co-creation experiences advances opportunities for personalised interactions and experiences and signifies the position and role of customers within a customer experience ecosystem (Prahalad & Ramaswamy, 2004:10).

An ecosystem structured around a customer's experience is not isolated. It is rooted and co-shaped by the service ecosystem (Keyser, 2015:31). However, this concept of the service ecosystem umbilical cord is supported by Heinonen *et al.* (2010:534). These researchers declared that the customer experience ecosystem is independent and develops from a different perspective. It is not a subcategory of the S-D Logic.

This study posits that the cross-pollination between S-D Logic and the customer experience ecosystem cannot be denied. The former enables a more comprehensive constitution of the latter. It suggests that the customer experience ecosystem evolves from S-D Logic's inherent shortcoming of not adequately providing for a Drucker truth (1954:34) - that business always evolves around the customer being at the centre stage. The customer experience ecosystem, similar to the service ecosystem, also consists of three layers, micro, meso, and macro and share some of the same elements applicable to the layers of the service ecosystem (Barari & Furrer, 2018:237; Bodine & Hagen, 2013:9; Keyser, 2015:3). The micro level of the service ecosystem, featuring the customer and buyer-seller interactions (Vargo & Lusch, 2008:333) also resembles the micro level of the customer experience ecosystem. The symbiosis between these two ecosystems can graphically be depicted as illustrated in Figure 3-3.

Customer engagements and interactions with service provider companies imply a complex set of relationships that must be developed, shaped, and promoted for parties to extract value from it. These engagements and interactions typically occur during customers' journeys at service provider touchpoints and are enabled, orchestrated, and guided by an organisation's internal business policies, processes, and the application of technology (Bodine & Hagen, 2013:8).

Relationships are also impacted and affected by forces external to the company over which the company cannot control (economy, competitors, customer social-economic forces, disruptive technologies). As is the nature of any ecosystem, the customer experience ecosystem is in a state of constant change as decisions by ecosystem stakeholders have specific consequences

and impact on the nature and functioning of relationships and interactions within the complete ecosystem (Bodine & Hagen, 2013:8).

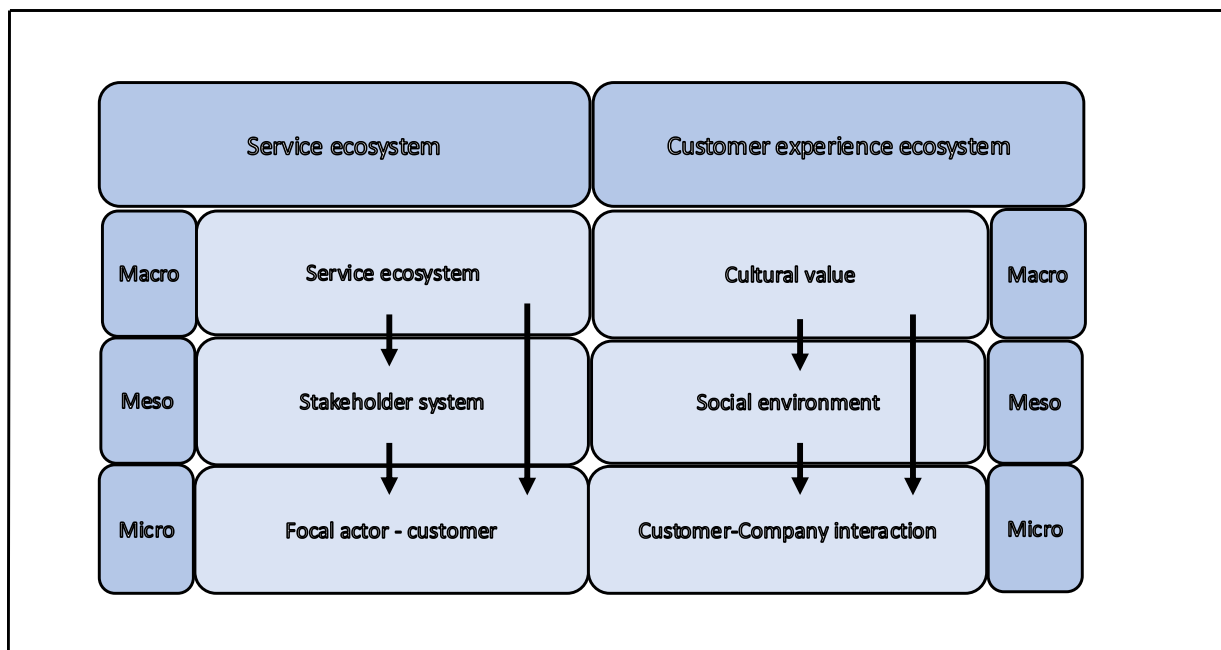


Figure 3-3: Service and experience eco-system symbiosis

Source: Adapted from Frow *et al.* (2014:334) and Barari & Furrer (2018:237)

3.5.3.1 Constituting features of a customer experience eco system

The customer experience phenomenon defines the construct at the core of this multilevel relationship ecosystem, and lacks conceptual clarity (Kranzbühler *et al.*, 2018:434). Kranzbühler *et al.* performed an extensive customer experience literature review spanning three decades to provide conceptual guidance and direction,.

The review's outcome facilitates a better understanding of the construct by identifying the parameters within which customer experience can be positioned as a marketing construct. It also provides an integrative perspective on various possible customer experience ecosystems constituting features (Kranzbühler *et al.*, 2018:438). These features highlight the ecosystem's umbilical cord with services marketing, S-D Logic, and service experience research (Helkkula, 2011:367).

The constituting features can be summarised as follows:

1. The customer experience from a consumer behavioural point of view is not only cognitively based on elements such as value and price but is also hedonic, symbolic, and aesthetic in nature, and thus, by implication, not fully controllable by a service provider.

2. The construct can be approached from two distinct perspectives: an organisational and a consumer perspective. This implies that an organisation-customer interaction, or vice versa, might not be experienced by a customer as intended by the service organisation. Aligning the two perspectives through connecting insights should be beneficial to identify what the customer experience construct means to customers and how service organisations can best satisfy their requirements.
3. The organisational perspective makes provision for the service organisation to focus on customer needs and wants as the key to designing service processes and systems, creating stimuli for desired experiences within the customer's journey, and the role employees can play in creating desired customer experiences. The customer perspective focuses on individuals' reactions towards interactions through cognitive, affective, and sensory evaluations of interactions or relationships with a service supplier organisation.
4. Applicable to the organisational and the customer perspective, two streams, types or levels of customer experience can be identified. Static customer experiences that reflect on one or several interactions with an organisation at one specific point in time along a single customer journey. The other stream represents dynamic customer experiences that imply multiple interactions and relationship building with a service organisation over time, from which an overall experience is cultivated as it evolves.
5. In both static and dynamic experiences, touchpoint environmental factors can influence customers' experiences. These factors include physical surroundings, store atmosphere, store cues (stimuli), journey experiences via an organisation's service system and the role played by all direct and indirect stakeholders in the service process.

In outlining the customer experience ecosystem by identifying and describing its constituting features, Kranzbühler *et al.* (2018:447) provide a conceptual framework for framing a customer journey more effectively. At the core of the ecosystem and customer experience lies the customer journey, designed by the organisation but assessed, evaluated, and experienced by the customer. Organisations should thus incorporate a customer's view to define which encounters form customer journeys (Kranzbühler *et al.*, 2018:447).

The conceptual guidance from Kranzbühler *et al.* (2018:433-456), derived from the dissection of three decades of customer experience research, not only provides value insights into the conceptual framework and features of the customer experience ecosystem but also assists marketing scholars in identifying key precepts and properties of customer experience.

3.5.3.2 The precepts and properties of a customer experience ecosystem

The customer journey being at the core of customer experience, as postulated by Kranzbühler *et al.* (2018:447), suggests an interaction of some kind. Within the customer experience ecosystem, as defined by Bodine and Hagen (2013:7), lies a complex set of relationships that also implies interactions. Vargo and Lusch (2010:172) state that through exchanges, parties participate in processes of total service provision to obtain utility and cater to one another's needs and wants. In each of these references, the customer plays the central role in the interaction, the relationship, or the exchange. Keyser (2015:25) states that the first precept of customer experience is an interaction of any nature (direct, indirect, imaginary, past, present, or future) with a customer through an interface of the customer's choice.

Interaction is the first precept of customer experience. Keyser (2015:26) proceeds by declaring that each interaction presents its own unique experience, good, bad, or indifferent (Berry *et al.*, 2002:89) and in this lies the second fundamental precept of customer experience. The third basic precept of customer experience resides in its multidimensional nature. A unitary experience can consist of collaborative expressions gained on different but interrelated human experience levels, including cognitive, emotional, physical, sensorial, and social elements (Keyser, 2015:26).

With these three basic customer experience precepts as basis, Keyser (2015:27-34) identifies four dimensions or properties that not only provide a more holistic conceptualisation of the construct but also assist in providing more clarity on the intricacies of the customer experience ecosystem within which it functions:

1. Customer experience is subjective in nature. For example, an experience depends on a customer's unique heterogeneous background and can also be impacted by the social realm in which the customer resides and functions - "CX is inherently personal and unique to the individual customer" (Keyser, 2015:28).
2. The uniqueness of an experience lies within the uniqueness of the individual and the social realm within which the individual functions and is context dependent. Depending on the context within which duplicate interactions (interactions of the exact nature) occur, a customer might not live through the same experience with multiple similar interactions across different occasions. Keyser (2015:28) attributes this phenomenon to the individually intra-subjectivity nature of customer experience – "CX is individually intra-subjective, the same individual will most likely experience a similar service exchange differently between occasions in a different context" (Keyser, 2015:28).

3. Customer experience is influenced and co-shaped by a multi-layered service ecosystem of three levels, as highlighted in paragraph 3.5.2.3. First, the micro level represents the interactions and relationships between the customer and the service provider. Keyser (2015:31) describes this layer as “highly deterministic” as the service provider has several means to create and affect the experience. This includes marketing mix elements, trained service staff, store atmospherics and specifically designed store cues to enhance customer experiences. The second level that impacts an experience, the meso level, represents a customer’s interactions and engagements with the extended direct and indirect role-players within the service provision process. The macro-level, within which the meso and micro levels operate, also impacts customer experience. This level comprises macro-environmental elements associated with the broader economy, regulatory, technology, legal and social environments encompassing the shopping environment.
4. The fourth dimension or property ascribed to customer experience is event-specific and dynamic (Keyser, 2015:32). Customer experience is individually intra-subjective (second dimension) and is associated with a particular customer-service provider interaction. In the case of multiple event-specific interactions at one company touchpoint or multiple event-specific interactions at various touchpoints, a dynamic experience evolves. Dynamical experiences also result from past, current, and even anticipated future interactions that can impact a customer’s experience at a particular event-specific interaction. Keyser (2015:34) further postulates that “dynamic CX does not equal the sum of all individual event-specific CX’s, but accounts for specific peaks of intensity, time intervals and fluctuations between all individual event-specific experiences that feed it.”

These dimensions closely mirror that of the service ecosystem as defined and explained by Akaka and Vargo (2015:456,460), Barari and Furrer (2018:235,236), Helkkula (2011:370) and Vargo and Lusch (2008:9). It furthermore confirms the symbiotic relationship between the service ecosystem and the customer experience ecosystem and brings to the fore the concept of service design, which features prominently in the service ecosystem, and acts as a foundational cornerstone of customer journeys (Kranzbühler *et al.*, 2018:447).

3.5.3.3 Customer experience ecosystem, customer journeys and service design

Customer experience ecosystems incorporate a system or network modelling approach prevalent in natural ecosystems, a methodology favoured over the typical firm-centric models prevalent in the marketing literature (Bhattacharya & Korschun, 2008:116). However, the former differs from the latter on one important aspect – customer experience ecosystems can be “intentionally designed” (Bodine & Hagen, 2013:16, Kranzbühler *et al.*, 2018:440). This is possible as Barari

and Furrer (2018:235) notes that customer experience is a process that can be constructed, staged, and created (Heinonen *et al.*, 2010:540). The opportunity to design an experience beckons a new challenge - How to design an experience that not only appeals to customer senses but also to their cognitive decision-making processes? (Kranzbühler *et al.*, 2018:448).

The application of service design principles and methodologies in designing a customer journey as an enabler of experiences comprises the planning and organising of multiple, multifaced business elements (Press & Cooper, 2016:69). This includes operating systems, touch point processes, service staff, products, services, levels of interactions and interfaces, the application of customer cues and the utilisation of environmental atmospheric space to provide a framework within which the journey takes place (Bodine & Hagen, 2013:16). This process of design is based on a thorough understanding of customers' needs and wants and their everyday use of products and services. A process that Cain (1998:11) defined as "experienced-based design (EBD)".

In designing a customer experience journey, it is important to consider the nature of the customer experience. Jain *et al.* (2017:652) state that customer experience is holistic and interactive, implying that it occurs right through the customer decision-making and consumption process. It thus manifests throughout the different stages of a customer journey, from pre-purchase to post-purchase, and not limited only to the encounter stages with a service provider (Akaka *et al.*, 2015:459). The challenge is "to determine which moments in a journey are most critical and how they should be designed (Kranzbühler *et al.*, 2018:448). The holistic nature of customer experience can be illustrated by incorporating the three layers (micro, meso, macro) associated with the customer experience ecosystem and superimposing it on the different stages of the customer journey, as illustrated in Figure 3-4.

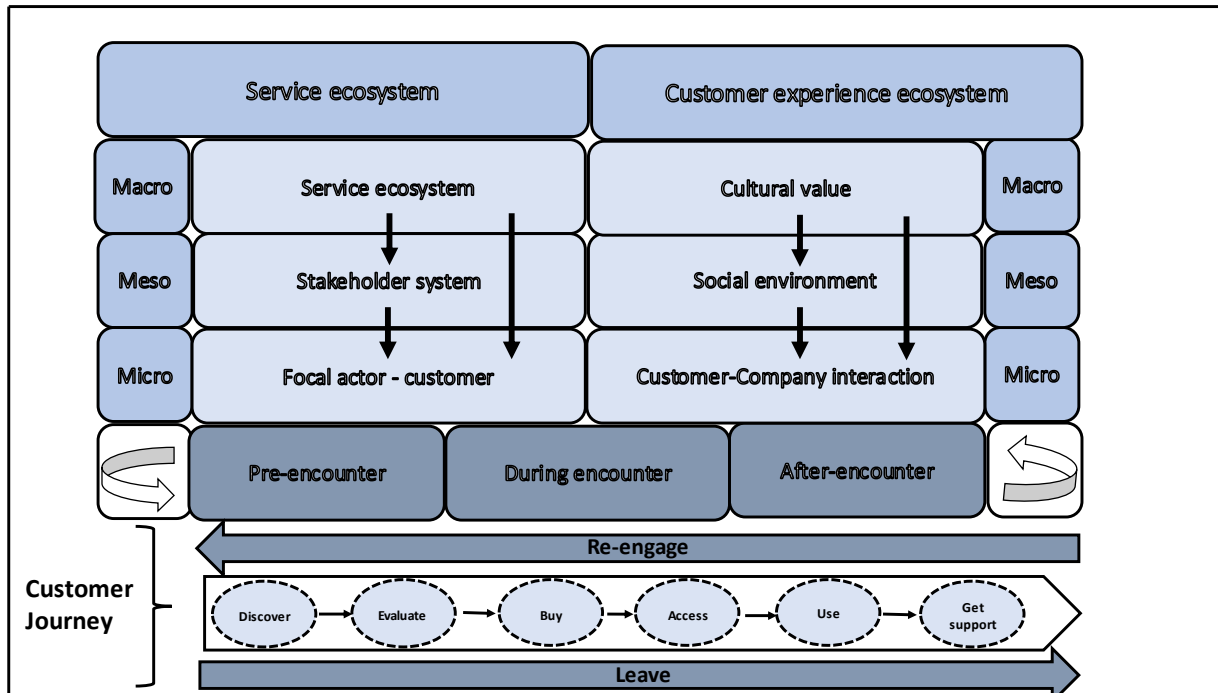


Figure 3-4: Service and experience eco-system and customer journey symbiosis

Source: Adapted from Barari & Furrer (2018:237), Bodine & Hagen (2013:9) and Frow *et al.* (2014:334)

The customer experience journey methodology and the application of service design principles in the design of a journey will be discussed in Chapter 4 in more detail.

Through the application of the ecosystem analogy, the importance of the experience construct, its' constitutes, position, and its role in post-modern marketing theory came to the fore. First, the service ecosystem was described, in which service experience increased in prominence with each step in the evolutionary development of the S-D Logic. Second, it considers the customer experience ecosystem, augmented by the C-D Logic, and touches on the ecosystem's constituting features, precepts, and properties. This provides the conceptual domain of customer experience and lays the foundational framework within which marketing researchers and practitioners endeavoured to define the customer experience construct.

3.6 CUSTOMER EXPERIENCE DEFINED AND DESCRIBED

The 'notion of experience', as portrayed from a non-management, management and marketing sciences point of view and the conceptual domain of customer experience, provide a broad platform for describing and exploring the different descriptions, characteristics, and definitions of customer experience.

From as early as the 1940s and more so in the 1950s, the satisfaction of multilevel customers' needs and wants played an important role in customer experiences (Abbott, 1955:40; Ansoff, 1957:114; Beckman, 1957:7). Customers' quest for meaning in life through the creation of intrinsic value and value-added interactions were identified as aspirational experiences sought by customers. Identifying these desires among customers coincides with the start of the behavioural revolution (Miller, 2003:141). Drotskie (2009:118) encapsulates this interdependent relationship with the behavioural sciences by stating that customer experiences begin and end with the customer, their needs, requirements, thoughts, emotions, behaviours, and observations.

3.6.1 Descriptions and definitions of customer experience

The interwovenness of customer experience with behavioural sciences, particularly customer behaviour science, can be seen from the definitions, characteristics, determinants, and perspectives in Table 3-1.

Table 3-1: Definitions, characteristics, determinants, and perspectives on customer experience

Definitions, characteristics, determinants, perspectives	Source
An experience is the result of a consumer activity that takes place by acquiring a product or service. The experience characterises the relationship and connection between man's inner wants and needs and an outer economic activity. People desire "experience-bringing" products and services.	Abbott (1955:40)
Experiential aspects of consumption accentuate the importance of the pleasure principle. This pleasure-oriented consumption focuses on customer emotions, feelings, and subconsciousness. It is personal, subjective of nature, emotional, non-routine, transformational, a sense of community and flow and results from interactions between customers, objects, the environment, and other people. The experiential model extends beyond the principles of the information processing model. It is holistic of nature and includes cognitive, symbolic, aesthetic, and hedonic elements where customer behaviour focuses on the search for "...fun, amusement, fantasy, arousal, sensory stimulation, and enjoyment."	Holbrook & Hirschman (1982:132,135)
Customer experience is a broad concept and should not only be linked to a product and/or a service. It is an ever-evolving concept with developing properties, resulting from a complex of interrelated, shared and overlapping relationships influenced by personal, environmental, and situational inputs.	(Hirschman & Holbrook (1986:220).
Customer experience is the impressions or feelings customers live through in their interactions with an organisation's products, services, and "atmospheric" stimuli. These integrated aligned customer feelings are derived from multiple perceived or intuitively sensed stimuli or clues (or the absence thereof) that customers consciously and unconsciously screen.	Carbone & Haeckel (1994:9)

Definitions, characteristics, determinants, perspectives	Source
The clues can be performance (product or service performance) based or context (store atmospherics) based. Combining all the clues forms the customers' rational and emotional impressions and creates the customer experience.	
Customers purchase an experience that is associated with, but is something different from, the goods and services acquired. The experience represents a series of enjoyable instances being staged by an organisation that touched the customer in an inherent personal manner. Customer experience is a completely new concept and functions next to products and services. The concept involves products and services as elements of a stage production that aims to create memorable events for customers. Services are used as the "stage" and products as the "props" during customer interactions, focusing on creating a positive customer experience that enhances and strengthens the relationship with a customer. "Commodities are fungible, goods tangible, services intangible, and experiences memorable".	Pine & Gilmore cited by Lemon & Verhoef (2016:70) Pine & Gilmore (1998:98)
Experience itself is a broad term that can refer to any sensation or knowledge acquisition resulting from person's participation in an activity. Suggests that an experience involves learning during a period when a customer interacts with different elements of a context, created by the service provider. Experiences are co-created between customer and service providers, as the context and the activities performed reinforce each other to unique experiences.	Gupta & Vajic cited by Anaman (2010:24)
Customer experience is a customer- and not a marketing concept. It is process oriented. The shopping process is not only about satisfying a material need or want. It entails all the actions, behaviours, and consequences that form part of the shopping process. It includes experiences relating to shop design, service staff behaviour, product quality and price, the complete end-to-end shopping process. Customer experience is a "process-orientated satisfaction idea" to build customer relationships.	Schmitt (2003:14)
From a revised service-dominant logic perspective, customer experience is defined concerning intangible resources (alternatively tangible resources), the cocreation of value (alternatively embedded value) and relationships (alternatively transactions) as a subjective response to an all-inclusive service process. Multiple participants are involved in a service provisioning process relating to the integration of resources linked to value, rooted in a specific context, to create and foster a "connection between a market provider and a market beneficiary". Service, inherently customer-oriented and relational, is at the root of direct and indirect exchanges between market providers and customer. Though the customer is a co-creator of value, it is the sole value determinant as the market provider can only deliver value propositions.	Vargo & Lusch (2004:3) Vargo & Lusch (2008:7).
Customers undergo an experience when interaction with an organisation on the concurrent delivery and receipt of a service. This interaction results into a physical and psychological meeting between company and customer leading to specific customer perceptions and judgements on the	Dawes & Rowley (1998:350-356)

Definitions, characteristics, determinants, perspectives	Source
nature of the experience. The interaction is not only between provider a customer, but it also embodies the context of the interaction. This includes the physical environment, access to information, participation by the customer, the role of service staff and the ability to action transactions speedily and proficiently. Perceived service quality, the consequence of a comparison between customer expectations and customer perceptions of performance, is integral to customer experience.	
Customer experience is a multi-dimensional (“eclectic”) construct as every service exchange or interaction between customer and company leads to a customer's cognitive, behavioural, emotional, sensorial, and social response. Customer sensations play an important role in consumption behaviour, especially in how their senses are stimulated and influenced when interacting with an organisation. Experiential marketing focuses on , impacting the customer’s senses, feelings, thought processes, actions, and relations with the company with whom they interact. “Experiential marketing is distinct in four keyways: focusing on consumer experiences, treating consumption as a holistic experience, recognizing both the rational and emotional drivers of consumption, and using eclectic methodologies.”	Schmitt (1999:57,59)
Customer experience amounts to an integrated feeling that customers develop from interacting with an organisation's goods, services, and “atmospheric” clues (stimuli). Anything perceived or sensed is regarded as an experience clue. The clues carry each a message causing a sensory and emotional feeling that evokes a distinctive value perception from customers. The value perception results from a sequence of experiences brought about by interacting with an organisation. The improved blending of humane, mechanic, and functional clues can positively influence customer value perceptions and enable an emotional connection between customer and company.	Haeckel <i>et al.</i> (2003:18-21)
Edvardsson <i>et al.</i> describe service experience as “a service process that creates the customer’s cognitive, emotional, and behavioural responses, resulting in a mental mark, a memory”.	Edvardsson <i>et al.</i> (2005:151)
An all-encompassing customer experience arises with active and lasting interactions between customer and supplier. The interaction across all elements of consumption leads to a positive, participative, and long-lasting relationship that appeals to customers’ physical and emotional needs. At the root of this lies a prominent market offering.	Mascarenhas <i>et al.</i> (2006:399)
Multiple interactions with a product, an organisation or even parts of such an organisation manifest as a customer’s experience. This experience elicits a personal reaction from the customer and evokes a connection, or not, on different levels, “rational, emotional, sensorial, physical and spiritual”.	Gentile <i>et al.</i> (2007:397)
Experiences flow from direct contact (purchase or service obtained in person from an organisation) or indirect contact (secondary or coincidental contact via advertising, word-of-mouth compliments and/or criticism) with an organisation resulting in an inner and subjective response from a customer.	Meyer & Schwager (2007:118)

Definitions, characteristics, determinants, perspectives	Source
Retail experience typically focuses on store atmospherics and the impact of scents, music, tactile input, and colour on customers' affective responses to a retailer.	Naylor <i>et al.</i> (2008:50)
Customer experience is a service provider's "product" that focuses on the service delivery process. It is an outcome, or the result, of an interaction (customer with store environment, staff, self-help technologies) between service provider and customer. It represents the individual customers' interpretation of the service process and the interactions that impact and influence their feelings. It determines the strength of the customer-service provider relationships.	Sirapracha & Tocquer (2012:112)
Customer experience refers to the fundamental value customers ascribe to the company, its brands and the products and services they use. This perceived value appeals to customer's senses and is embodied in a combination of experiences; their sensory (aesthetics, sensory qualities), emotional (mood, emotions), intellectual (analytical, imaginative), behavioural, and relative value (social) experiences These aroused values of sense, feel, think, act, and relate "takes into account all comprehensive experiences associated with consumption by customers" and should be viewed in the context of their consumption lifestyles.	Nagasawa (2015:36)
Brand experiences are subjective consumer responses from pre-purchase (search), purchase, and after-purchase (consume) shopping interactions. The responses are sensory, affective, intellectual, and behavioural and can be induced by "specific brand-related experiential attributes" or stimuli. A stimulus can evoke any of the four individual responses or a combination and can influence customer behaviour. It typically can have an impact on customer satisfaction and customer loyalty.	Brakus <i>et al.</i> (2009:53)
Experiences are holistic. Not only does it include the total shopping experience (searching, purchasing, consumption and after-purchase), it touches on all shopping elements whether in control of the retailer (within the boundaries of the retail store) or outside its span of control (shopping centre, security) impacting on the customers' "cognitive, affective, emotional, social, and physical responses to the retailer".	Verhoef <i>et al.</i> (2009:32)
"One of the key ideas of experiential marketing is that value does not only reside in the objects of purchase (products and services), and their utilitarian and functional benefits. Value also lies in the hedonic and experiential elements surrounding the product and service and in the consumption experience itself. Rather, when consumers summarize and evaluate these experiences in memory, they extract certain defining or salient features – or gestalt characteristics – of these sequences."	Schmitt & Zarantonello (2013:26,39)
It results from direct and/or indirect interactions between customers and those market entities they deal with. These interactions are "...marked by different levels of uniqueness and composed of multiple elements whose exact manifestation varies across contexts and situations". The exchanges between customer and market entities lead to various cognitive, emotional, physical, sensorial, and social responses from the customer. The responses, manifested customer experiences, are:	De Keyser (2015:26)

Definitions, characteristics, determinants, perspectives	Source
- personal and unique to the individual customer's social norms and values, - dependent on the customer's personal context fit (objectives, goals, projects, family, friends, life cycle), - dependent on market and service eco-system contextual factors, including an organisation's market mix, store atmospherics', quality of service staff, sub-contracting, and the prevailing macro-economic, - environment, - specific single interaction-related interactions, but also interactions that subsequently evolved (multiple interactions).	
Customer experience is a more social construct influenced by external factors over which companies do not exercise full control. It is multidimensional, "focusing on a customer's cognitive, emotional, behavioural, sensorial, and social responses to an organisation's offering during the customer's entire purchase journey".	Lemon & Verhoef (2016:71)
It relates to the customer's journey through an organisation where the interactions between the consumer and the company involve multiple customer responses, including emotional, cognitive, behavioural, sensorial, and social leading to unique experience reactions, consequences, and memories.	Jain <i>et al.</i> (2017:642)
Customer experience is the evolvment of multi-sense responses (affective, cognitive, relational, and behavioural) of customer interactions through a journey of touchpoints (verbal, non-verbal), from prepurchase, purchase, and post-purchase situations, comparing the journey against threshold responses with previous experiences.	Homburg <i>et al.</i> (2017:384)
Customer experience cannot be created. It is non-deliberate, spontaneous, subjective and context specific customer responses and reactions to internal (company controlled) and external (non-company controlled) stimuli. The responses and reactions to the stimuli range from ordinary to extraordinary depending on the customer, situational, and sociocultural variables. It is through offering related stimuli, that can be designed, monitored, and managed, that companies can affect customer experiences.	Becker & Jaakkola (2020:637)
Consumer experience speaks about a customer's journey through an organisation where the interactions between the customer and the company results in a connection that spans over several dimensions including emotional, cognitive, behavioural, sensorial, and social	Puntoni <i>et al.</i> (2021:132)

Table 3-1 shows how a cross-section of marketing experts describes the customer experience construct. It also shows how the construct evolved and varies among authors. However, in the instance of Verhoef *et al.* (2009:32) and Lemon and Verhoef (2016:71), which spans nine years, there exists very little change in the researcher's underlying definition of the customer experience construct.

3.6.2 Towards a unified definition of customer experience

A dynamic and enduring debate exists among marketing academics and practitioners regarding the exact definition and dimensions of the customer experience construct. Calder *et al.* (2013:21) express the need to search and establish some foundational truths about the construct. Different interpretations tend to lead to a diverse set of arguments, leaving researchers and organisation leaders with little assistance and direction regarding the “true meaning and nature” of the construct (De Keyser, 2015:13).

In dissecting, contextualising, and comparing the different definitions through the application of Aristotle’s “elements of circumstance”, commonly referred to as the 6 W’s & 1 H, it is notable that a golden thread runs through most of the definitions (Sloan, 2010:239). In applying the elements of circumstance, some salient features, qualities, characteristics, determinants, and perspectives on customer experience have been identified (Table 3-2). The analysis assists in establishing common denominators within the variety of definitions, formulating an all-encompassing definition that is true to, illustrates and supports the holistic nature of the construct.

Table 3-2: Customer Experience definitions in accordance with the elements of circumstance

Analysis of Customer Experience definitions in accordance with the elements of circumstance (6 W's & H)							
Author(s)	Who	What	Where	When	With what	Why	How
Abbott (1955:40)	Consumer	Characterises relationship and connection between inner wants and needs and outer economic activity	At economic activity	During economic activity	Products and services	Desire for an experience through products and services	Through acquisition activity
Holbrook & Hirschman (1982:135)	Customer	It is personal, subjective, emotional, non-routine, transformational. It portrays a sense of community and flow. It is holistic of nature and includes cognitive, symbolic, aesthetic, and hedonic elements	In interactions between customer, service provider objects, environment, and other people	During interactions between customer, service provider objects, environment, and other people	Appeals to emotions, feelings, and sub-consciousness	Accentuates the importance of the pleasure principle. Customer behaviour focuses on the search for "...fun, amusement, fantasy, arousal, sensory stimulation, and enjoyment."	Through interactions between customer, service provider objects, the environment, and other people
Hirschman & Holbrook (1986:220).	Customer	A broad concept, ever-evolving concept with developing properties. The result of complex, interrelated, shared, and overlapping relationships	At relationship level	During relationship level	Influenced by personal, environmental, and situational inputs.		The consequence of a complex of interrelated, shared and overlapping relationships

Analysis of Customer Experience definitions in accordance with the elements of circumstance (6 W's & H)							
		influenced by personal, environmental, and situational inputs.					
Carbone & Haeckel (1994:9)	Customer	Integrated aligned impressions and feelings that customers live through in interactions with an organisation's products, services, and "atmospheric" stimuli.	Exposure to stimuli and clues from performance (product & services) or context (store atmospherics)	During screening, consciously, unconsciously of stimuli or clues (or the absence thereof) by customers	Derived from multiple perceived or intuitively sensed stimuli or clues (or the absence thereof)	Result of service provider stimuli or cues	Combination of all the clues forms rational and emotional impressions and creates the customer experience
Pine & Gilmore (1998:3)	Customer	Purchase an experience, not only goods or services	Staged by the service/goods provider	At interfaces	Staging of a series of enjoyable experiences	To touch the customer in an inherent personal manner.	By staging a series of enjoyable experiences
Schmitt (2003:14)	Customer	It entails all actions, behaviours and consequences that form part of the shopping-process activities	At shopping interface	During shopping process	It is process orientated, impacted by shop design, service staff behaviour, product quality and price, the complete end-to-end shopping process	Aimed at building relationships with customers	Process-orientated satisfaction idea broader than only satisfying a material need or want.

Analysis of Customer Experience definitions in accordance with the elements of circumstance (6 W's & H)							
Vargo & Lusch (2004:3)	Customer orientated	A subjective response to an all-inclusive service process where the customer is the sole determinator of value	Rooted in specific service process context	During provisioning process - direct and indirect exchanges between market provider and customer	Market provider delivering of value propositions to foster relationships	To create and foster a "...connection between market provider and a market beneficiary".	Multiple participants involved in a service provisioning process relating to the integration of resources, cocreation of value and relationships
Dawes & Rowley (1998:350-356)	Customers	It is perceived service quality and performance - the consequence of comparing customer expectations and perceptions of performance.	At interaction with a service provider company	During delivery and receipt of a service	Influenced by physical shop environment, access to information, customer participation, service staff and the ability to action transactions speedily and proficiently	Leading to specific customer perceptions and judgements on the nature of the experience	A physical and psychological meeting between company and customer, leading to specific customer perceptions and judgements on the nature of the experience
Pine <i>et al.</i> (1998a:98)	Customer	Separate concept and functions next to products and services.	Services are being used as the "stage" and products as the "props"	During customer interactions	Products and services as elements of a stage production	To create memorable events that enhances and strengthen the relationship with a customer	Services are being used as the "stage" and products as the "props" during customer interactions

Analysis of Customer Experience definitions in accordance with the elements of circumstance (6 W's & H)							
Schmitt (1999:57)	Customer & Service provider	A multi-dimensional wide-ranging construct as every service exchange leads to a customer's cognitive, behavioural, emotional, sensorial, and social responses.	At every service exchange or interaction between customer and service provider	During every service exchange or interaction between customer and service provider	Senses are being stimulated and influenced when interacting with service provider	To elicit a cognitive, behavioural, emotional, sensorial, and social response from a customer	Stimulation of customer senses through every service exchange or interaction between customer and service provider
Haeckel & Carbone & Berry (2003:18-21)	Customer	It amounts to an integrated feeling that customers develop from interacting with an organisation's goods, services, and atmospheric clues (stimuli).	By interacting with an organisation.	During interacting with an organisation.	Interacting with goods, services, and atmospheric clues (stimuli) of an organisation	To evokes a distinctive value perception from customers. Can positively influence customer value perceptions and emotional connections between customer and company	Anything perceived or sensed (clues) carry a message causing a sensory and emotional feeling that evokes a distinctive value perception from customers.
Edvardsson <i>et al.</i> (2005:151)	Customer	Service process that evokes cognitive, emotional, behavioural responses	At interaction with service process	During interaction with service process	Service process	Resulting in a mental mark, a customer "memory".	Interacting with an organisation's service process creating customer responses

Analysis of Customer Experience definitions in accordance with the elements of circumstance (6 W's & H)							
Mascarenhas <i>et al.</i> (2006:399)	Customer and supplier	The interaction across all elements of consumption leads to a positive, participative, and long-lasting relationship that is appealing to a customers' physical and emotional needs	At interaction across all elements of consumption	During Interaction	Interaction across all elements of consumption	Leads to a positive, participative, and long-lasting relationship that is appealing to a customers' physical and emotional needs	Arises where there are active and lasting interactions between customer and supplier
Gentile & Spiller & Noci (2007:397)	Customer	Multiple interactions with a product, an organisation, or components of such an organisation elicits a reaction from the customer that is personal and evokes a connection, or not, on emotional, rational, sensorial, physical, and spiritual levels	At interaction	During multiple interactions	Interactions with a product, an organisation, or components of such an organisation	Evokes a connection, or not, on different levels and elicits a reaction from the customer that is personal	Multiple interactions with a product, an organisation, or components of such an organisation manifest as a customers' experience
Meyer & Schwager (2007:118)	Customer	It flows from direct or indirect contact with an organisation resulting in an inner and subjective	At direct and/or indirect contact with an organisation	During direct and or indirect contact with an organisation	Direct contact - purchase or service obtained in person from an organisation) or indirect contact	To elicit an inner and subjective response from a customer	Direct and or indirect contact with an organisation resulting in an inner and

Analysis of Customer Experience definitions in accordance with the elements of circumstance (6 W's & H)							
		response from a customer			(secondary or coincidental contact via advertising, word-of mouth compliments and/or criticism)		subjective response from a customer
Brakus <i>et al.</i> (2009:53)	Customer	Subjective consumer responses resulting shopping interactions. The responses are sensory, affective, intellectual, and behavioural in nature and can be induced by "specific brand related experiential attributes" or stimuli	From pre-purchase (search), purchase, and after-purchase (consume) shopping interactions.	From pre-purchase (search), purchase, and after-purchase (consume) shopping interactions.	A stimulus evokes individual responses influencing customer behaviour	Impact on customer satisfaction and customer loyalty	Resulting shopping interactions. The responses are sensory, affective, intellectual, and behavioural in nature and can be induced by "specific brand related experiential attributes" or stimuli.
Verhoef <i>et al.</i> (2009:32)	Customer	It is holistic and include the total shopping experience (searching, purchasing, consumption and after-purchase)	At the total shopping experience (searching, purchasing, consumption and after-purchase),	During the total shopping experience (searching, purchasing, consumption and after-purchase),	It touches on all shopping elements whether in control of the retailer (within boundaries of retail store) or outside its span of control (shopping	Create growth and sustain profitable growth	Total shopping experience impacting on the customers' "...cognitive, affective, emotional, social and physical responses to the

Analysis of Customer Experience definitions in accordance with the elements of circumstance (6 W's & H)							
					centre, security) impacting on the customers		retailer". Prior experiences will influence future experiences
Sirapracha & Tocquer (2012:112)	Customer and service provider	It focuses on the service delivery process. It is an outcome, or the result, of an interaction between service provider and a customer. It represents the individual customers' interpretation of the service process and the interactions that impact and influence the customers' feelings	At interaction	During interacting	Customer Interaction with store-environment, staff, self-help technologies	It determines the strength of the customer-service provider relationships	It is an outcome, or the result, of an interaction. It represents the individual customers' interpretation of the service process and the interactions that impact and influence the customers' feelings
Schmitt & Zarantonello (2013:26, 39)		It represents value that resides in the objects of purchase (products and services), and their utilitarian and functional benefits. Also, in the hedonic and experiential elements	At purchase and when benefits are extracted from there	During purchase and benefits extracted therefrom	Elements surrounding the product and service, and in the experience of consumption itself	Value and benefits (hedonic and experiential) to be extracted from objects of purchase (products and services) and in the experience of consumption itself	Purchases of products and services and benefits associated. Value can be extracted from hedonic and experiential elements surrounding the

Analysis of Customer Experience definitions in accordance with the elements of circumstance (6 W's & H)							
		surrounding the product and service, and in consumption itself.					product and service, and in consumption
De Keyser (2015:26)	Customer	It is the result of direct and/or indirect interactions between customers and market entities leading to a variety of cognitive, emotional, physical, sensorial, and social responses from the customer	At single or multiple direct and/or indirect interactions between customers and market entities	During single or multiple direct and/or indirect interactions between customers and market entities	Composed of multiple elements with different manifestation. Depends on market and service eco-system contextual factors including an organisation's market mix, store atmospherics', quality of service staff, sub-contracting, and the prevailing macro-economic environment	Evoke a variety of cognitive, emotional, physical, sensorial, and social responses from the customer.	The result of direct and/or indirect interactions between customers and market entities, leading to a variety of cognitive, emotional, physical, sensorial, and social responses from the customer
Lemon & Verhoef (2016:71)	Customer	It is a more social construct influenced by external factors (companies do not exercise full control). It is multidimensional "...focusing on a customer's cognitive,	Throughout a customer's entire purchase journey	During customer's entire purchase journey	Influenced by multidimensional controllable internal and not-so-controllable external factors	Customer responses to being exposed to an organisation's offerings through the purchase journey	Exposure to an organisation's customer journey "...focusing on a customer's cognitive, emotional, behavioural,

Analysis of Customer Experience definitions in accordance with the elements of circumstance (6 W's & H)							
		emotional, behavioural, sensorial, and social responses to an organisation's offering".					sensorial, and social responses to the company's offerings
Jain <i>et al.</i> (2017:642)	Customer	It is a holistic interactive process, impacted by cognitive and emotional clues, influenced by customer and contextual features, manifested into unique and pleasurable/un-pleasurable memories	At interactive process	During interactive process	Cognitive and emotional clues customer and contextual characteristics	Resulting into unique and pleasurable/un-pleasurable memories	Interactive process impacted by clues
Homburg <i>et al.</i> (2017:384)	Customer	Multi-sense responses of customer interacting through journey of touchpoints comparing the journey against threshold responses with previous experiences	At customer journey along prepurchase, purchase, and post-purchase situations	When interacting with verbal, non-verbal, service provider touchpoints	Customer's sensorial, affective, cognitive, relational, and behavioural responses	Customer loyalty and long-term growth	Customer multi-sensorial responses to interacting with service provider and referencing with previous interactions with touchpoints from prepurchase to post-purchase

Analysis of Customer Experience definitions in accordance with the elements of circumstance (6 W's & H)							
Becker & Jaakkola (2020:637)		It is non-deliberate, spontaneous, subjective and context specific customer responses and reactions (depending on customer, situational, and sociocultural variables) to internal and external stimuli.	At interaction with stimuli	During interaction with stimuli	Customer responses and reactions to internal and external stimuli. It is through offering related stimuli, that can be designed, monitored, and managed, that companies can affect customer experiences.	The responses and reactions to the stimuli range from ordinary to extraordinary depending on the customer, situational, and sociocultural variables	Customer responses and reactions to internal and external stimuli
Puntoni, S. <i>et al.</i> (2021:132)		It relates to the customer's journey through an organisation where the interactions between the customer and the company involves multiple customer dimensions.	At interaction between customer and company	During an interaction between customer and company	Through the customer journey	To evoke emotional, cognitive, behavioural, sensorial, and social responses	Through the customer journey that prompts multiple responses from customer-interactions with an organisation

In applying the elements of circumstance, the following fundamentals, as extracted from Table 3.2, should be considered for inclusion in a representative, all-encompassing customer experience description or definition that supports the holistic nature of the construct as reflected in research studies:

Who – customer (consumer) and market provider

What – it represents non-deliberate, spontaneous, subjective and context-specific multi-sense (emotional, cognitive, behavioural, sensory, and social) customer responses and reactions to internal and external stimuli encountered during customer interactions throughout the total shopping process that manifest into unique and pleasurable/un-pleasurable memories

Where - At direct or indirect interactions between customer, service provider, service provider objects, environment, and other people throughout the total shopping journey experience, including searching, purchasing, consumption and after-purchase

When - During direct and indirect exchanges between market provider and customer through its conscious, unconscious screening of stimuli (or the absence thereof) from pre-purchase (search), purchase, and after-purchase (consume) shopping interactions.

With what - Derived from multiple perceived or intuitively sensed cognitive and emotional, internal, and external stimuli (or the absence thereof) brought about by shopping elements whether in control of the retailer or outside its span of control. These elements include shop design, service staff behaviour, products and services, self-help technologies, access to information, customer participation, prevailing macro-economic environment, and the ability to action transactions speedily and proficiently.

Why - To touch the customer in an inherent personal manner evoking emotional, cognitive, behavioural, sensorial, and social response. Aimed at building positive, participative, and long-lasting relationships that appeal to customers' needs and value perceptions and create sustainable profitable growth.

How – During customer journey interactions, the combination of all the internal (company controlled) and external (non-company controlled) stimuli eliciting sensory, affective, intellectual, and behavioural responses and forms customer' rational, emotional, and distinctive value perceptions affecting customer experiences.

In considering the evolution of the customer experience construct as described in Chapter 2, the conceptual domain of the construct and the fundamental properties of a cross-section of

definitions as portrayed in marketing literature, this study proposes the following integrative definition to be most representative and encompassing of the construct:

Customer experience represents non-deliberate, spontaneous, subjective, context-specific and transformational multi-sense (emotional, cognitive, behavioural, sensory, and social) customer impressions, perceptions, judgements of value and responses and reactions to internal and external elements (shop design, service staff behaviour, products and services, self-help technologies, access to information, customer participation, prevailing macro-economic environment) through the customers' conscious/unconscious screening of stimuli encountered during direct and indirect exchanges with a market provider throughout the total shopping journey (searching, purchasing, consumption and after-purchase), aimed at touching the customer in an intrinsic personal manner that leads to a positive, participative, and long-lasting relationship that is appealing and beneficial to a both customer and market provider.

Despite the critique regarding the lack of conceptual clarity and multiple definitions based on differing empirical suppositions, practitioners, researchers, and scholars agree that good customer experience has a positive impact on customer satisfaction, loyalty, and other customer-related parameters (Alexander & Kent, 2022:1; Cherry, 2023; Kranzbühler *et al.*, 2018:433). They further agree that the customer experience phenomenon is firmly grounded and has been identified as an emerging source of competitive advantage and should be meticulously managed (Lemon & Verhoef 2016:70; Palmer, 2010:204).

3.7 SUMMARY

The conceptual customer-centric management framework for an in-store customer experience journey is based on three fundamental pillars: the customer experience philosophy, service design practices, and customer journey methodologies, as illustrated in Chapter 1, Figures 1-4.

This chapter examined the first foundational pillar, the customer experience philosophy, by considering some challenges to the traditional marketing definition. Also, in deliberating notions of experience in non-management and management and marketing sciences, a description of the conceptual domain of the customer experience construct and considering a cross-section of customer experience definitions found in marketing science literature. The chapter concludes with an integrative, representative, and all-encompassing definition of customer experience that supports the holistic nature of the construct as reflected in research studies.

The following chapter concentrates on the other two foundation pillars of the conceptual customer-centric experience journey management framework: service design and customer journeys.

Service experience research confirms that customer experience design results in customer journeys that are thematically cohesive, consistent, and context-sensitive and builds customer loyalty (Homburg *et al.*, 2017:386).

CHAPTER 4 SERVICE DESIGN AND CUSTOMER JOURNEYS

4.1 INTRODUCTION

The previous chapter discussed and defined customer experience as the first of three first-order resource pillars of the marketing trinity that represent one of the foundational roots of the conceptual customer-centric experience management framework as proposed by this study. Along with the increased focus on customer experience as a separate economic offering comes the challenge for businesses to apply service design principles to create, stage and engineer customer experiences along the customer's journey through the business (Carbone & Haeckel, 1994:8-19).

Empirical evidence confirmed that applying service design principles to intentionally designed customer journeys through applying appropriate stimuli or clues in a thematically cohesive, consistent, and context-sensitive manner can positively influence customer perceptions and experiences (Kuehnl *et al.*, 2019:551). Research further indicated that intentionally designed customer journeys can impact customer buying behaviour, patronage intentions and loyalty (Liao *et al.*, 2012:73; Sheng, 2016:4; Theodoridis & Chatzipanagiotou, 2009:709;). The merging of service design principles with customer journey methodologies to evoke mutually beneficial emotional connections between an organisation and its customers is in its infancy and is still foreign to most companies (Johnston & Kong, 2011:2; Zomerdijs & Voss, 2011:65).

This chapter focuses on the remaining two first-order foundational resource pillars of the marketing trinity that support the conceptual experience management framework. The application of service design and customer journey methodologies, principles, tools, and techniques in pursuing optimal customer experiences could contribute to obtaining a better understanding of customer requirements and expectations and provide a sound foundation for the design of an appropriate retail store customer-centric experience management framework (Johnston & Kong, 2011:6).

Supporting a more effective merger of the two methodologies should be developing and implementing appropriate experience-focused emotional stimuli/clues/cues at the retail store level. Triberti *et al.* (2017:1) refer to emotional design focussed on promoting “of positive emotions or pleasure in users employing design properties of products and services”. This is to target customer feelings and reap the benefits of connecting with customer needs, requirements and emotions made possible through effective and efficient service-designed customer journeys

(Ennis, 2016:153). The result should culminate into well-defined retail service system elements or constructs supporting a customer experience journey flow structure (Ding *et al.*, 2010:5).

It is through the flow structure that customers can experience complete absorption in the moment of retail shopping (Nakamura & Csikszentmihalyi, 2014:239). This optimal experience accompanying dimensions of “merging of action and awareness, clear goals and feedback, focused attention, loss of self-consciousness, altered sense of time, a sense of control, and perceived match between challenges and skills” that result in “high levels of enjoyment and a nurturing of oneself identify” (Voelkl & Ellis, 1998:380).

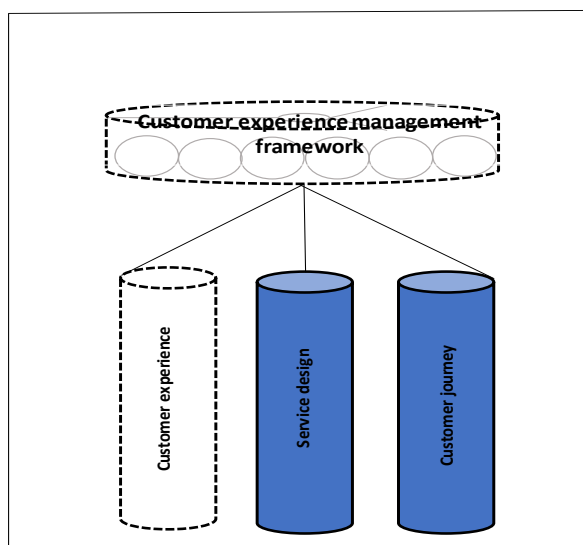


Figure 4-1: Service design and customer journeys as pillars of the conceptual customer-centric experience management framework.

The customer experience philosophy, as discussed in Chapter 3, retail store service design principles and the customer journey methodology are catalysts for formulating the constructs of this study's conceptual customer-centric experience management framework.

4.2 SERVICE DESIGN

The second foundational pillar of the retail marketing trinity comprises service design (Figure 4-2). The need for and the focus on service design is necessitated by the quest of organisations to keep abreast with, adhere to and satisfy the ever-changing needs and wants of customers (Atasoy & Martens, 2016:183). The objective is to design a service with a sequence of related events (Verhoef *et al.*, 2004:54) by combining, condensing, and integrating various disciplines (aesthetics, ergonomics, engineering, and marketing) to facilitate, create and mediate customer experiences (Atasoy & Martens, 2011:91).

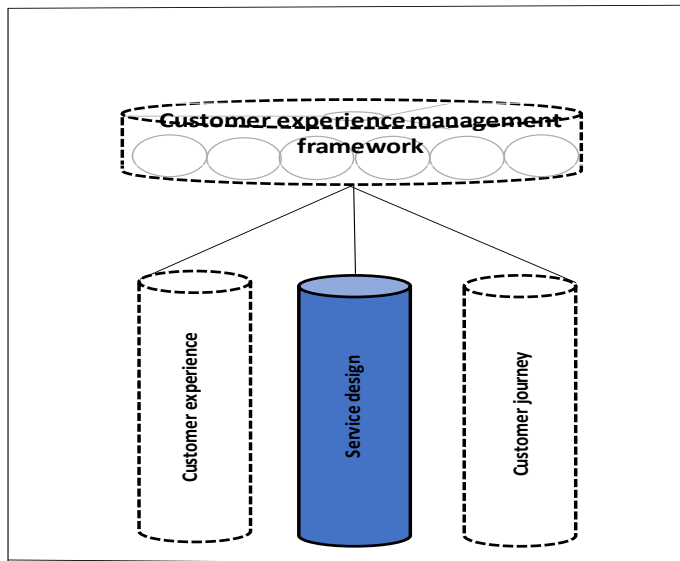


Figure 4-2: Service design as pillar of the conceptual customer-centric experience management framework

Companies, particularly their marketing executives, are constantly challenged to remain relevant in the marketplace, make their brands more acceptable to customers, and engage with consumers effectively and meaningfully. It is an ongoing service design journey to find new, refreshing and rewarding ways and means to remain relevant in the marketplace and to persuade customers to engage and persevere with organisations and their brands (Lieberman, 2021:119). Research has proven that service design “involves a variety of sensory modalities that influence consumers’ cognition, mood, and emotions, as well as their behaviours” (Roggeveen *et al.*, 2020:130).

4.2.1 The concept of service and flow in unison

The challenge of sustainability (Ozanne *et al.*, 2016:249) and relevancy led Shostack (1977:73) to argue for the conceptual boundaries of marketing to be expanded beyond transactional product profit-maximisation. Shostack contends that marketing requires a more comprehensive framework where the concept of service is conceptually equally weighted as the product (Chapter 2). The service concept defines the ‘how’ and the ‘what’ of service design so that customers can be exposed to and experience a service that functions seamlessly (Goldstein *et al.*, 2002:121, 122).

The need also exists for a proper understanding, acceptance, and implementation of the concept of flow in services (Nakamura & Csikszentmihalyi, 2014:240). The flow concept relates to a dynamic system consisting of a customer and an environment where interactions unfold seamlessly from activity to activity (Nakamura & Csikszentmihalyi, 2014:241). The customer is

perceived as an initiative-taking, self-regulating organism interacting with the service organisation. Flow is a dynamic equilibrium between perceived action capabilities (environment) and perceived action opportunities (customer). The equilibrium occurs where and when a customer is fully entrenched in the shopping process, resulting in an optimal customer experience, absent of anxiety or boredom (Nakamura & Csikszentmihalyi, 2014:241).

Capabilities and opportunities drive the concepts of service and flow but do pose specific challenges since product quality has always been relatively easy to assess, but services, being “intangible, heterogeneous and inseparable”, are not (Ghotbabadi *et al.*, 2012:2). Organisations tend to struggle to formulate a realistic view on how their services are being perceived and experienced by customers and this could impede on successful service design solutions (Goldstein *et al.*, 2002:121; Zeithaml & Bitner, 2003:3).

The abstract nature of services in general, as described by Ghotbabadi *et al.* (2012:2), led to their being under-designed and inefficiently developed compared to physical products. This called for more innovative and creative approaches toward services, resulting in the emergence and advancement of New Service Development, Service Design and Service Engineering (Goldstein *et al.*, 2002:122). These approaches aim to support and strengthen the design and development of services “either as a system itself or as a constituting element of a Product–Service System” (Cavalieri & Pezzotta, 2012:1).

Various approaches to designing a service exist in related academic literature. Some models' nature is subjective, implicit, affective, and sometimes “fuzzy” (Bouchard & Omhover, 2016:56). Service design should not be overcomplicated. Patricio *et al.* (2018:7) argue that service design builds on only two research disciplines: design and service.

Defining the concept of service design before reflecting on some of the many service design models should moderate the fuzziness surrounding the concept, as mentioned by Bouchard and Omhover. It should also reveal the proximity and pertinency with the customer experience philosophy (Chapter 3) and customer journey methodology that follows the service design discussion.

4.2.2 Service design defined

Service design is a multifaceted concept and can be defined from several different perspectives (Patricio *et al.*, 2018:7). Goldstein *et al.* (2002:121) adopt a short and concise definition of service design in stating that it should be based on the “service concept” and involves “an appropriate mix of physical and non-physical components”. The service concept relates to the detailed

description of what the customer expects to receive to satisfy its needs and wants, how the service provider intends to deliver (operations) the required service, and an alignment of the actual service delivered (Goldstein *et al.*, 2002:123, 131). By deconstructing the 'what' and 'how' into physical and non-physical components, the elements of the service concept can be identified and designed according to the needs and wants of customers (Goldstein *et al.*, 2002:124).

Scott (2016:18) argues that service design represents how a customer experience of value can be delivered to a customer. The delivery of experiences is the objective of service designers who examine and re-engineer service strategies, operational systems, processes, and resources. Bodine and Hagen (2013:16) state that service designers "plan and organise complex systems of people, products, interfaces, services, and spaces". Ostrom *et al.* (2010:17) focus on system complexities and user-centeredness and define service design as "the orchestration of clues, places, processes, and interactions that create holistic service experiences for customers, clients, employees, business partners, or citizens".

Service design's foundational roots reside in the insights of people (designers, practitioners, academics) directed at the authentic innovation of services leading towards improved experiences (Scott, 2016:20). The authenticity of the innovations lies in improved customer interactions, the fine-tuning and adapting of processes, policies, and organisational cultures to deliver the sought-after customer interactions (Bodine & Hagen, 2013:8). Due consideration should be given to the relationships among company employees, partners, and customers throughout customer journeys as enabled by policies, processes, technology, and culture and influenced by forces external to the company as it determines the quality of all interactions (Bodine & Hagen, 2013:8).

One of the most comprehensive and all-inclusive definitions of service design is formulated by Scott (2016:18), who approaches service design from a problem-solving perspective. Scott defines service design as "a mindset and a set of tools comprising a methodology for solving problems where the goals of people, technology, process, and behaviour come together. The core value of service design is putting humans – their voices, their needs, empathy with their realities and insights into their behaviour - into the design of services, products, organisations, interactions, and experiences".

Though service design can be defined from various viewpoints, some key common denominators can be identified. It focuses on users/customers and optimises business elements, processes, operational systems, and resources. The focus is on interactions of creating holistic service experiences for customers and all other organisational stakeholders.

Historically, marketing, technology, and industrial engineering business practitioners, innovators, and researchers have focused primarily on product design and innovation. Only recently has the value of service design featured more prominently, as defined above, and is being pursued through specific service-centred design methodologies (Ostrom, 2010:17).

4.2.3 Service design methodologies

The stronger focus and growth of a service-led economy supported by the development of a service management paradigm in the late 1970s and 1980s (Huo & Hong, 2013:40) introduced a period of heightened awareness that services have the potential to become the new competitive advantage (Zeithaml & Bitner, 2003:11). Scientific studies on New Service Development, Service Design and Service Engineering were initiated and published to assist, guide, and promote the intentional design and development of services (Cavalieri & Pezzotta, 2012:280; Goldstein *et al.*, 2002:122).

New Service Development (NSD), concentrating on a marketing and a strategic level, addressing the service life cycle continuum from market idea to development to launch, became a key feature in marketing-related literature (Cavalieri & Pezzotta, 2012:281). In this context, Brown (2008:88) refers to the process as a proto-type of design thinking and describes it as the result of a “creative human-centred discovery process followed by iterative cycles of prototyping, testing and refinement.” Brown postulates that the design process is not the typical business activity process consisting of a sequence of linear predefined actions but rather constitutes a system of related activities congregated together into a purposefully structured continuum of seamless activities (Brown, 2008:88; Goldstein *et al.*, 2002:122; Nakamura & Csikszentmihalyi, 2014:240).

Service design (SD) focuses on a service organisation's structure and content. It can be seen as a process-driven intervention that includes an investigation to fully understand what will be designed in what format by incorporating customer perspectives and requirements (Cavalieri & Pezzotta, 2012:281). In general, it deals with aspects such as interaction design that includes service capes and elements of service (Bitner 1992:58; Morone *et al.*, 2018:257). It particularly concentrates on customer interfaces at organisational touchpoints (Cavalieri & Pezzotta, 2012:281).

Cavalieri and Pezzota (2012:281) contend that the standalone NSD (an organisational focus) and SD (a customer focus) processes lack pertinence and cohesiveness. As separate independent processes, it does not provide adequate methodical meaning to service design and development nor enable seamless integration of product and service contents (Gummesson, 1995:250). Patri'cio *et al.* (2011:191; 2018:10) prefer not to use the word “seamless” as it implies the

existence of boundaries and rather refers to a “smooth” integration as it relates to a feeling of flow. Cavalieri and Pezzotta (2012:282) believe these shortcomings can be overcome by applying Service Engineering (SE) principles and proposing SE as an appropriate mediation mechanism to support and promote properly structured service design.

This researcher agrees with Cavalieri and Pezzotta on the individual shortcomings should the three methodologies (NSD, SD & SE) be applied in isolation. When applied in unison, supported by service-applicable design approaches, it could enrich marketing and retail practitioners with relevant and practical implementable knowledge to enhance customer experiences and create a strategic competitive positioning in the marketplace (Malhotra *et al.*, 2017:7). It thus has the potential to inspire practitioners and marketing professionals to design customer service experiences that keep and grow customer relationships (Lieberman, 2021:220).

In practice, SE designers would typically construct and utilise categories of visual, verbal, or multi-sensory information on users' (customers) needs to engineer tools or methodologies that enhance and strengthen customer interaction (Bouchard & Omhover, 2016:57,68). In this context, Kansei engineering design models provide a scientific framework for the translation of customer cognitive and emotional relations and the integration of visual, verbal, semantical and multi-sensory information applicable to customer's psychological needs, wants and feelings (Bouchard & Omhover, 2016:57,67).

4.2.4 Service design approaches (models)

Comments about the fuzziness of service design models by Bouchard and Omhover (2016:56) most probably originate from earlier models that attempt to augment service design by incorporating elements from disciplines such as integrated product development, artificial intelligence, Kansei engineering and cognitive ergonomics (Bouchard & Omhover, 2016:67).

The comments might also result from an acknowledgement that customer experience is not only limited to in-store interactions but is also influenced by out-of-store aspects Roogeven *et al.* (2020:128). Roogeven *et al.* (2020:130) proposed the DAST framework of retail atmospherics to be considered in designing services. The four DAST factors, *design, ambient, social, and trialability* affect different stages of a customer's journey and impact on the overall customer experience in both in and out of stores factors (Roogeven *et al.*, 2020:129).

The concept of service design evolved from being seen as an innovation tool only to a widely diffused practice (Micheli *et al.*, 2018:1). This increasing awareness and the value of a service focus led to the development and application of various service design approaches and models.

Amongst these is the application of participatory, interactive, user-centred, use-cases, goal-directed, traditional technologically orientated, and human-centred approaches (Gascon, 2003:30,33).

To categorise and characterise the most prominent service design approaches, Giacomini (2014:607) highlights three design movements: technology-driven design, environmentally sustainable design, and human-centred design. Though these three design paradigms might be operating within the same macro, meso and micro levels of a service ecosystem, their applications can result in differences in product, system, or service (Giacomini, 2014:608).

Krippendorff (2004:44) argues that there is an emergent epistemology towards human involvement. The importance of human feelings, thoughts, actions, the recognition, and reality of human experiences validates a shift from object-centred (objectivity, product, normative functions, natural science and engineering, cognitive sciences) to human-centred service design (human understanding and behaviour, not physical qualities but what it means to customers) (Krippendorff, 2004:47,48).

4.2.5 Human-centred design

From the many design approaches available and the three most prominent design groupings (Giacomini, 2014:607), the human-centred design approach is regarded to be universal and widely accepted in marketing sciences' product, service, and interactive application developments (Rossi, 2019:420). This approach provides standing to Gummesson's (1995:250) encouragement to have a customer perspective on business, not a product and service perspective.

Human-centred design can be confused with user-centred design. However, closely related Gasson (2003:30) argues that the two design approaches are not synonymous. The first relates to a "social system of interacting human activities, multiple, implicit (and often conflicting) goals, human understanding and knowledge, business context and application-specific cultures and practice". The latter relates more to a "technical system of formal, rule-based procedures and technology, managed by performance indicators and exception-handling" (Gasson, 2003:31). The researcher states that user-centred design has a goal-directed, technical problem-solving focus and does not cater for, or promote, human interests (Gasson, 2003:41). The human-centred design approach, contrary to a technical problem-solving focus, allows for a humanistic design approach that incorporates human and associated market-related elements (Giacomini, 2014:619).

It incorporates elements such as customer needs and requirements, the application of ergonomics, usability knowledge and techniques, aiming to improve human well-being, which play an important role in human-centred designs (Rossi, 2019:420). The objective of placing the customer at the core of business activities resonates with the Customer-Dominant Logic that advocates for businesses to be built on an in-depth knowledge of their customers (Heinonen *et al.*, 2010:534).

This in-depth knowledge of the customer enables organisations to design products, services, interactive systems, and customer processes that contribute and provide value to the lives of customers (Heinonen *et al.*, 2010:534). As indicated in Chapter 3, the call for a customer perspective in design is supported by Schembri (2006:381), who also argues for a more in-depth understanding of offerings from a customer's experience perspective and concludes that "effective marketing begins with the customer's experience" (Schembri, 2006:389).

The focus on a broader wants-and-needs approach shows a close resemblance to the renowned psychologist Abraham Maslow's hierarchical needs theory, where human needs are in ascending order of significance, culminating into a level of "self-actualisation" (Grant, 1999:400). At the centre of the journey framework should be the "elicitation of transformative experiences" to facilitate sensorial, perceptual, cognitive, and affective customer processes towards self-actualisation and self-transcendence (Gaggioli, 2016:97).

Literature provides for a substantive body of knowledge on human-centred designs and, in particular, the application of disciplines such as ergonomics and usable knowledge to enable interactive systems to be more customer-friendly (International Organisation for Standardization, 2010:vi). Giacomini (2014:608) believes that the roots of human-centred design can be found in disciplines such as ergonomics, computer science and artificial intelligence.

4.2.5.1 Roots of human-centred design

In exploring the role of ergonomics in system design "The International Organisation for Standardisation" through ISO 9241-210 (Ergonomics of human-system interaction, human-centred design for interactive systems) provides a universal human-centred framework that can be applied to a variety of design processes (International Organisation for Standardization, 2010:2). ISO 9241-210 specifically refers to six principles that are applicable to any human-centred approach irrespective the design process followed (International Organisation for Standardization, 2010:5):

1. Designs (product, service, systems) should be based on detailed knowledge of customers, tasks, the applicable environment, and other stakeholder groups.
2. User involvement in design and development processes through active participation is important.
3. Human-centred designs should provide feedback and adequate user-centred evaluations to ensure meeting user and organisational needs.
4. Interactive human-centred designs should be an iteration process to eliminate uncertainty and revise or refine the system under development to match user requirements properly.
5. Designs should address and accommodate prior user experiences, attitudes, skills, habits, personalities, perceptual and user emotional aspects, and thus, the whole user experience.
6. Design teams should be diverse and consist of multidisciplinary skilled members with multi-perspective approaches sensitive to user needs and requirements.

The principles applicable to human-centred designs have not seen significant changes over the years, have been validated through their application in design processes, and complement existing design approaches (International Organization for Standardization, 2010:vi).

Giacomin (2014:606) acknowledges the role ISO 9241-210 plays in developing human-centred designs. The researcher describes in detail the evolvement of design paradigms from a physical consideration to the metaphysical acknowledgement of the role of the perceptual, cognitive, and emotional value of offerings to customers. The growth path associated with design paradigms includes the focus on ergonomics, “moving through human factors, usability, user-centred design, inclusivity, interaction design, empathic design, design for product experience, design for customer experience, design for emotion, emotionally durable design, sensory branding, neuro-branding, service design and finally, most recently, the umbrella paradigm of human centred design” (Giacomin, 2014:610).

Through human-centred designs, interactive and sociological aspects can also be accommodated to model customer interactions and incorporate customer value perceptions, experiences, and the meanings customers attach to offerings (Giacomin, 2014:612). The researcher illustrates these multiple layers of a human-centred design as a hierarchy (Figure 4.2)

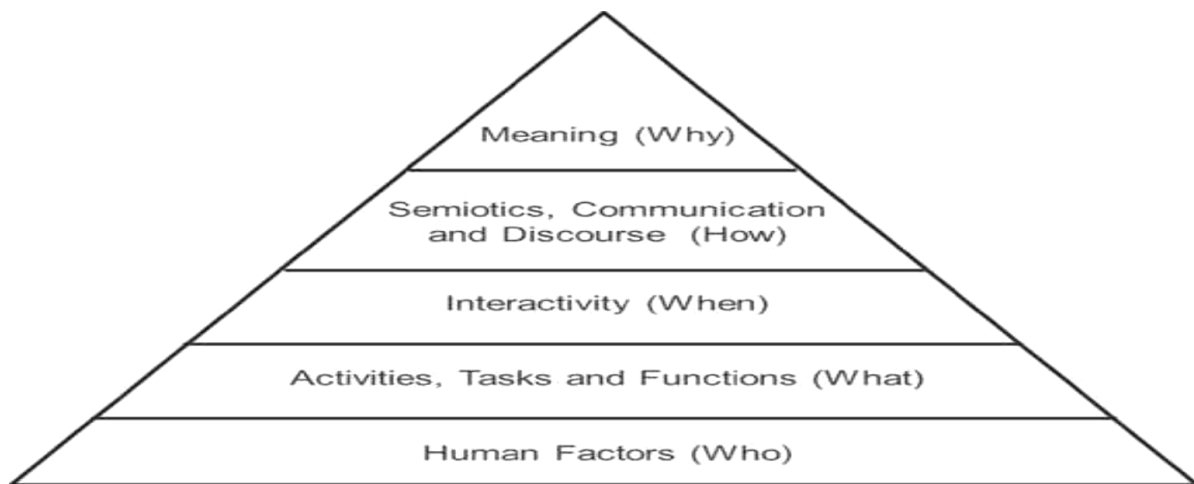


Figure 4-3: The human centred design pyramid.

Source: Giacomini (2014:613)

The higher tiered level of “meaning” relating to the perceptual, cognitive, and emotional value of customer’s perceptions, the significance attached to service delivery, interactions, and experiences reflect strongly on and focus on human-centred design paradigms, specifically in customer experiences.

4.2.5.2 Human-centred designs for customer experience

The emphasis on the physical, perceptual, cognitive, and emotional value associated with “meaning” in the human-centred design paradigm shows its coherence with the logic and structure of the customer experience philosophy (Giacomini, 2014:606, 613). As marketing research refines the focus from the broader service experience approach to the “value constellation” of customer experience, the design of interactions between customers and organisations becomes more critical (Patricio *et al.*, 2018:10).

The design objective should enable customers to navigate smoothly through a service interface continuum of service activities without obstacles or problems and enjoy the experience (Patricio *et al.*, 2011:186, 191). Gummesson (1995:250) refers to “seamless” navigation, while Triberti *et al.* (2017:1) refer to “fluid interactions as a fundamental factor for an overall positive experience”.

Lieberman (2021:219) regards managing human experience as a core marketing capability. Successfully executing this capability results in meaningful and improved customer engagements that can lead to psychological ownership, higher customer loyalty, and sustained competitive advantages in the marketplace. In pursuing these objectives, Lieberman (2021:220) suggests four principles in designing service-facing interfaces to develop and implement a customer

experience continuum of interface activities. The following principles facilitate the context for and development of internal organisational capabilities to deliver meaningful human-centred experiences:

1. Experience design should apply to the complete customer-organisation value chain. It implies a comprehensive experience design of all customer lifecycle aspects and an end-to-end design of the pre-purchase, purchase, and after-purchase processes.
2. Experience design should focus on creating open experiences to enable personalised interactions and provide more differentiation opportunities, which is not always possible with closed proprietary customer systems. Applying open-sourced common standard design principles allows designers to link and create more connected experiences effortlessly. It opens the door for integration with the larger retail service and experience eco-systems, retail partner participation, streamlined customer experiences and more value for customers.
3. Experience design should acknowledge that human behaviour is never consistent, and resiliency should be built into experience elements. Human-centred designs should allow for updates and changes to the customer engagement cycle where and when required and needed. This can include changes to delivery mechanisms and channels necessitated by customers' changing needs and wants. Bolton (2020:282) stresses the requirement for organisations and experienced designers to acquire scholarly knowledge to design flexible and resilient service networks that support human-centred experiences.
4. Experience design can benefit from actual customer behaviour evidence as received from customers and observed during interactions throughout the customer engagement processes. Observing and acknowledging fundamental life changes in customer experience lifecycles can provide opportunities for innovation and “illuminate the path toward greater engagement and loyalty” (Lieberman, 2021:222).

Applying the four principles allows organisations to elicit new service ideas through a human-centred and holistic customer experience design thinking approach (Lieberman, 2021:222; Patri'cio *et al.*, 2018:3). The objective is to enhance customer loyalty and provide an experience incentive to customers to repeatedly choose the organisation's touchpoint journey from pre-purchase to post-purchase. Alternatively, as stated by Pullman and Gross (2004:551), the purpose is to create an emotional connection with customers through careful planning and designing tangible and intangible service elements posing as service clues, stimuli, or cues.

4.2.5.3 Service design and touchpoint clues, stimuli, and cues

Ostrom *et al.* (2010:17) define service design as “the orchestration of clues” that create customer and stakeholder experiences. Becker and Jaakkola (2020:633) support the notion and role of clues but refer to them as “stimuli” when defining customer experience, and the role stimuli play in eliciting desired experiences and responses from customers interacting with an organisation. Baker *et al.* (1992:445) refer to the same factors influencing customer patronage but identify the factors as “cues”. Becker and Jaakkola (2020:639) also refer to “cues” and define it as the smallest multisensory stimulus that customers can perceive that impacts a customer’s experience.

This study postulates that, given the context of reference, finer nuance differences exist between “clues”, “stimuli” and “cues”. Its application, however, strives towards the same objective – intentionally constructed clues, stimuli, and cues aim to influence customers’ perceptions and impact their buying behaviour and patronage intentions (Seock 2009:331; Sheng, 2016:4). This study will use these three terms interchangeably depending on the context of reference, accepting that its deployment in whatever form has the same supreme objective of a quality customer experience in mind.

Several inferences exist when researchers refer to clues, stimuli, or cues. In early services marketing research, clues “represent the tangible evidence” associated with a service to judge a service before acquiring or using it (Shostack, 1977:77). Holbrook and Hirschman (1982:134), in discussing experiential aspects of consumption, refer to the verbal stimuli associated with products (product attributes) but also nonverbal multisensory cues that must be seen, heard, tasted, felt, or smelled to be appreciated. Demircüneş (2014:49) concurs and refers in this regard to visible stimuli (product, price) and abstract stimuli (atmosphere, service staff attitude) that form part of a customer’s multidimensional framework of benefit and value.

Berry *et al.* (2006:23) argue that a critical management objective should encourage the design and orchestrating of clues as it impacts customer perceptions of service. Focussed clue management can positively impact customer satisfaction and have an important role in creating a total customer experience. Such is the importance of clue management that the researchers argue for including clue management in staff job descriptions.

4.2.5.3.1 Application of clues, stimuli, and cues

The application of cues in a retail environment is not only aimed at customers. Retail sales and service provider staff also evaluate customer visual cues (clothing, age, accents, words, phrases) during interactions to assess customer preferences and decide on the most appropriate approach

in dealing with customers (Field *et al.*, 2021:473). Cues, stimuli, or clues play a cornerstone role in this study's conceptual customer-centric experience management framework, and it requires more context.

Customer perceptions are based on information that is conveyed to them through a framework of elements including environmental clues, service features and service qualities that exist within business entities (Bitner, 1992:57). The framework consists of multiple environmental dimensions that include ambient, space, signs, symbols, and artefacts and is referred to as "services capes" (Bitner, 1992:60). These dimensions refer primarily to the physical environment where the interaction between customer and business takes place. Sheng *et al.* (2016:3) suggest that these elements, presenting themselves in micro (retail stores) and macro environments (shopping centres), are inter-related, inter-dependent and co-habitual. Customer perceptions of one service cape element can influence the perceptions of another (retail shopping centre on retail stores and vice versa).

Bitner (1992:65) and Kotler (1977:50) argue that intentional control and structuring of environmental clues, integrated and displayed in the design of physical business environments, can facilitate a customer's experience. Customers constantly scan for clues within business environments that would indicate their capabilities and suitability to provide an experience of quality. Chang and Horng (2010:2402) refer to these clues as signals with functional and emotional characteristics that customers receive and experience, eliciting an emotional judgement about the quality of an experience.

Berry *et al.* (2006:44) claim that the signals are carriers of messages to customers where clue and message converge into a total customer experience if consistent, cohesive, and compelling in application. The converged clues and messages play an important role in providing a business with a "personality or image" (Chang & Tu, 2005:198) that can influence customer satisfaction, - loyalty and - retention and predict specific attitudinal and behavioural customer reactions (Demirgüneş, 2014:2147).

The Bitner (1992:59) services cape framework of clues comprising a variety of objective environmental elements influence a customer's cognitive, emotional, and physiological mindset and culminate into the emotional judgement of an experience as highlighted by Chang and Horng (2010:2405). These environmental or atmospheric elements (Kotler, 1977:50) lead to planned patronage and unplanned impulse buying behaviour where clues cause spontaneous, impulsive customer urges (Mohan *et al.*, 2013:1725). Morone *et al.* (2018:256) ascribe the planned and impulsive customer buying behaviour to "the influence of situation, which is regarded as a significant explanatory factor of customer preferences and responses. The researchers state that

customers react not only on personal characteristics or attitudes but “based on some environmental cues-induced behaviour” (Morone *et al.*, 2010:256).

Bitner (1992:59) explained the importance of various clues. Later, Haeckel *et al.* (2003:22) added that a single clue does not provide a distinctive, preferred experience. An integrated design and layering of consistent, cohesive clues are required to elicit the desired customer experience (Berry *et al.*, 2006:44; Haeckel *et al.*, 2003:22). In this regard, three broad categories of clues are identified by Haeckel *et al.* (2003:20), functional, mechanic and humanistic clues.

Functional clues aim to meet customer expectations through the technical performance of the service or product. Mechanic clues influence first impressions, expectations, and value creation through tangibles associated with the service or product. Humanic clues aim to exceed customer expectations through clues emitted by human behaviour (words, voice, enthusiasm, body language) but also the appearance of service providers (neatness, appropriate dress) (Berry *et al.*, 2006:44; Haeckel *et al.*, 2003:20). Each of the three clue categories impact on the rational and emotional perceptions of service quality and contribute to customer’s service experience (Berry *et al.*, 2006:46).

To create distinctive customer value through experiences, the design, application, and management of the different clues should comply with the three cross-functional principles (Haeckel *et al.*, 2003:20, 21). The sequence of customer interactions from pre-purchase, purchase, and post-purchase (experiential breath) and the number and diversity of sensory clues (experience depth) should be merged in designing and implementing cues. Customer service perceptions are more effectively guided, aided, and reinforced through multiple layers of multi-sensory clues. As a second principle, business mechanics and humanises should be addressed in tandem and combined with functional clues. The third principle in clue design and deployment is to connect emotionally through all customer senses throughout the experience journey (Haeckel *et al.*, 2003:21).

4.2.5.3.2 Servicescape elements and customer experience frameworks

Functional, mechanic and humanistic cues, stimuli or clues are shaped primarily within the framework of business or retail store environmental dimensions identified and labelled by Bitner (1992:60) as “service scopes”. Baker *et al.* (2002:121) refer to these dimensions as store design, the store's social environment, and the store's ambience.

A review of conceptual frameworks for customer experience creation over the past three decades reveals that marketing researchers identified a variety of experience determinants of which

services cape environmental dimensions are the most prominent. These determinants are being evaluated and assessed by customers through organisational and environmental cues impacting customer experience perceptions. Though these determinants may differ in definition and description, dictated by the context and content within which the research was conducted, it all play an important role in the evolutionary development of customer experience models. Constructs embedded in conceptual frameworks for customer experience creation observed over three decades are presented in Table 4-1. These frameworks serve as empirical guidelines for this study's conceptual customer experience management framework.

Table 4-1: Constructs embedded in conceptual frameworks for customer experience creation.

Zeithaml (1988)	Bitner (1992)	Baker <i>et al.</i> (2002)	Vos & Zomerdiijk (2007)	Verhoef <i>et al.</i> (2009)	Ding <i>et al.</i> (2010)	Fatma (2014)	Sheng <i>et al.</i> (2016)	Lemon & Verhoef (2016)
Price Perceived quality Perceived value	Ambient conditions Space/ function Signs, symbols & artefacts	Store employee factors Store design Factors Store ambient factors	Physical environment Service employees Service delivery process Fellow customers Back-office support	Pre- customer experience (t-1) Social environment Service interface Retail atmosphere Assortment Price Customer experiences in alternative channels Retail brand Post-customer experience (t+1)	Perceived control Skill Focused attention Interactivity Challenges Product variety Service quality Process features	Pre-experience activities Brand performance Multichannel interaction Service interface Physical environment Social environment Price & promotions Post experience	Ambient dimensions Design dimensions Social dimensions Interaction Entertainment Discovery	Previous experience (t-1) Need recognition Consideration Search Choice Ordering Payment Consumption Usage Engagement Service requests Future experience (t+1)

Source: Adapted from Baker *et al.* (2002:121); Bitner (1992:60); Ding *et al.* (2010:103); Fatma (2014:38); Lemon & Verhoef (2016:77); Sheng *et al.* (2016:4); Verhoef *et al.* (2009:32); Vos and Zomerdiijk (2007:105); Zeithaml (1988:4).

One of the earlier conceptual frameworks for customer experience creation could be traced to Zeithaml's (1988:2) research on a means-end model. The research touched on the most important determinants of customer's shopping behaviour and can be regarded as a precursor to later customer experience model conceptualisations. The researcher utilises, as a point of departure, the "Gray Benefit Chain" methodology that aims to identify and evaluate the emotional and psychological benefits customers ("people pay-offs") obtain from a product or a service (Young & Feigin, 1975:73).

The means-end model proposed by Zeithaml (1988:5) contributes to understanding the cognitive structure of customers that consists of an abstraction of a chain of benefits starting at functional benefits, practical benefits, and ultimately emotional benefits (Young & Feigen, 1975:73; Zeithaml, 1988:5). Price, perceived quality, and perceived value are identified as important determinants for product and service experience assessed through the presence, or absence, of supporting intrinsic and extrinsic cues (Zeithaml, 1988:9). The researcher surmises that focussing on customer standards and perceptions about products and services, as drawn from underlying determinant cues, should enable organisations to meet customer expectations more effectively (Zeithaml, 1988:18).

Bitner adopted a different approach than Zeithaml, who focused on customer perceptions of benefits to be gained as choice determinants for customer behaviour. Bitner (1992:57) explores the role and impact of the physical retail environment on customer interactions and decision-making. Environmental determinants such as retail store ambient conditions, space and function and signs, symbols and artefacts are highlighted as "services capes" elements that can function as cues that impact customer's perceptions and service experience standards (Bitner, 1992:58,60).

Baker *et al.* (2002:120) acknowledge prior research on the impact of singular environmental elements on customer behaviour but postulate that more clarity is required on how multiple store environment cues together "shape consumers' merchandise value perceptions and how those perceptions, in turn, influence store patronage intentions" (Baker *et al.*, 2002:120). In formulating a conceptual framework for the influence of multiple store environmental cues on perceived value and store patronage, Baker *et al.* (2002:121) merged Zeithaml's (1988) with Bitner's (1992) research findings and integrated the elements of cognitive and environmental psychology with other interrelated theories. The latter includes elements of the inference- (customers interpret and judge retail store cues and extrapolate to the unknown), schema- (previous experiences used for prediction of service), and affordance (value assessments based on visual perceptions of a physical environment) theories.

The conceptual framework, as suggested by Baker *et al.* (2002:122), is an attempt to propose a first comprehensive store patronage model incorporating the suggestion that design, social and ambient environmental cues guide and impact customers' perceptions of quality, value and the overall shopping experience,

The research done by Zeithaml (1988), Bitner (1992) and Baker *et al.* (2002) can be regarded as of the most important pioneering work done on conceptual frameworks applicable to customer experience. As illustrated in Table 4-1, subsequent conceptual frameworks by Ding *et al.* (2010); Fatma (2014), Sheng *et al.* (2016), Verhoef *et al.* (2009), and Vos and Zomerdijs (2007), and all build on the research done by the mentioned three researchers. These conceptual frameworks provided the impetus for this study's conceptual customer-centric experience management framework.

Customer experience conceptual frameworks display the cues' design, implementation, assessment, and management dimensions. As these clues are inherent in creating the customer service experience, its "systematic and careful orchestration" throughout the customer journey creates desired and memorable customer experiences (Berry *et al.*, 2006:53,54; Patri'cio 2011:186; Pine & Gilmore, 1998:103). In the most simplistic terms, Lemon and Verhoef (2016:74) declare that customer experience is formed by a customer's journey with an organisation throughout customer-organisation encounters.

4.2.5.4 Service design and customer journey design

The design of service elements (Patri'cio *et al.*, 2018:3), interactions (Patri'cio *et al.*, 2008:320) and engagements (Lieberman, 2021:219) into human-centred customer touchpoints emerge as an essential approach to service innovation (Patri'cio *et al.*, 2018:3). Service innovation proves to have a substantial impact on customer behavioural intentions and experience and experiential design (Su, 2011:425). The reverse also applies as a deeper understanding of customer behavioural intentions and customer decision journeys open up opportunities for service innovation through customer journey design (Lemon & Verhoef, 2016:85).

Customer journey design refers to the extent to which customers perceive touchpoints designed in "a thematically cohesive, consistent, and context-sensitive way" across multiple service marketing, service operations, interaction design disciplines (Homburg *et al.*, 2017:386; Kuehnl, 2019:553; Patri'cio *et al.*, 2018:3). Embedded into customer retail journey design should be an acknowledgement of the role and function of intuitive touchpoint experience stimuli in customers cognitive, affective, emotional, social, and physical responses to retailers (Giacomin, 2014:610; Lemon & Verhoef, 2016:70).

4.3 CUSTOMER JOURNEYS

Service design in general and human-centred service design provides management and marketing specialists with an ideal platform to design, incorporate and unleash service elements that can function as catalysts for customer experience stimuli. Human-centred service design implies service elements (products, services, systems, processes) that are “physically, perceptually, cognitively and emotionally intuitive” (Giacomin, 2014:610). An important requirement for service elements to be intuitive is for touchpoint sensory stimuli to be observable, accessible, and physically and emotionally experienced by customers. The information and meaning of sensory stimuli should be obvious to customers and the intended emotion-inducing features and entrenched intelligent behaviours it evokes should be well-matched with customer needs, wants and behavioural intentions (Giacomin, 2014:610).

The challenge remains – how do you design, create, manage, and maintain a distinct customer experience resulting in an emotional engagement that leads to customer re-patronage (Prokesch, 1995:101)? Literature suggests that a possible solution to emotional engagement between customers and retail service providers lies in a customer-centric management framework implemented through an enabling tool for lifetime value creation defined as the “customer journey” (Maynes & Rawson, 2016:3).

A customer journey represents the sum of experiences that customers go through when interacting with an organisation, its channel to market, the customer touchpoints within a channel and its brand (Kolsky, 2016:3). A journey is a market ritual in nature and deals with the ‘how’ of a specific pathway on route to a fulfilling customer experience (Kuehnl *et al.*, 2019:553). Bolton *et al.* (2014:253) express the need for companies to redirect an exclusive performance-orientated focus and incorporate a focus on customer journey design for a more comprehensive and complete customer experience (Figure 4-4).

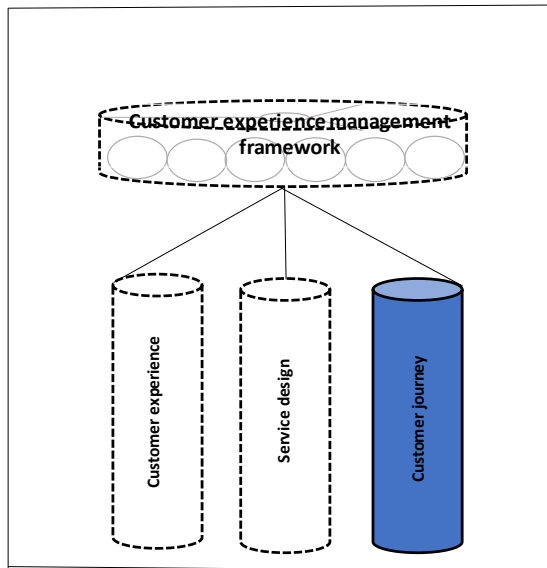


Figure 4-4: Customer journey as a pillar of customer-centric experience management framework

It is argued that deliberate staging (service design) and managing experiences within a customer journey, i.e. blending or enriching the experience philosophy with the journey methodology, defined as a “customer-experience-journey”, is an all-inclusive vehicle through which companies can obtain a competitive advantage (Jones & Vancauwenberghe, 2014:3). It is argued further that the tactic of mapping a customer experience journey should be positioned at the core of an organisation’s marketing strategies to ensure businesses are built around customers (KPMG Nunwood, 2015:4). These tactics are possible and can all be achieved within the confines of a retail customer touchpoint, a retail store.

Many experiences flow from customer interactions with a series of organisational touchpoints across all three stages (pre-service provision, service provision, post-service provision) of the shopping experience (Becker & Jaakkola, 2020:639). The journey represents and captures a customer’s daily shopping routine and includes interactions with all relevant stakeholders of the company they do business with (Hamilton & Price, 2019:187; Heinonen *et al.*, 2010:539).

The importance of a well-designed journey should not be underestimated as it is an important source of customer value and a driver of customer experience (Kuehnl *et al.*, 2019:551,553). Patri’cio (2011:186) concurs with this assessment of customer journeys and states that the customer journey determines the level of service experience and, ultimately, the customer’s experience.

Kimbell (2011:44) maintains that a noticeable trend exists in the marketplace in that experiential service designs are mostly approached from a customer journey perspective. Gruber *et al.*

(2015:2) support this view and suggest the application of the customer journey methodology for service design rather than standard process workflow approaches. Edelman and Singer (2015:91) and Lemon and Verhoef (2016:69) agree with the important role customer journey design can play in organisations as the experiences within a customer's journey determine organisational success and provide a competitive advantage in the marketplace.

The creation of a holistic customer service experience (Ostrom *et al.*, 2010:17) relies on the design of customer-centric services (Scott, 2016:18). Services aimed at engaging customers through integrated, consistent, and cohesively designed (Berry *et al.*, 2006:44) and orchestrated (Zomerdijs & Voss, 2010:68) multi-layered, multi-sensory service encounters and cues (Haeckel *et al.*, 2003:21). These encounters and cues should be entrenched in what is referred to as a customer journey that can influence customer responses (Becker & Jaakkola, 2020:640).

Cues are incorporated into a series of organisational touchpoints and service encounters with which customers interact or relate along the customer's journey through an organisation (Becker & Jaakkola, 2020:634). These cues should be derived from products, services, staff, and the environment and are constantly scanned and filtered by customers to enable an assessment of the organisation's ability and suitability to satisfy their needs and wants and to provide a quality experience (Berry *et al.*, 2006:44; Bitner, 1998:65; Otnes *et al.*, 2012:367). The cues are deliberate interventions planned by the management of organisations to guide and influence customers' behaviour towards a quality experience. However, Zomerdijs and Voss (2010:74) declare that though these planned interventions are commendable, the reality of actual customer behaviour is dependent on the touchpoints, the interactions and ultimately, the complete customer journey.

It is through the customer journey interactions and engagements at the touchpoint level that customers connect with an organisation on an emotional, physical, cognitive, social and spiritual level depending on the level of customer participation and the supporting business environment atmospherics (Bitner, 1992:57; Towers & Towers, 2021:825; Zomerdijs & Voss, 2010:68). Edelman and Singer (2015:92) argue that companies that seek to succeed in connecting with customers on all levels through customer journeys should become skilled at four interconnected capabilities. The most effective customer journeys result from an optimal mix of "automation, initiative-taking personalisation, contextual interaction and journey innovation" (Edelman & Singer, 2015:92).

Notwithstanding the above acknowledgement by marketing theorists, specialists, and practitioners that customer-centric designed journeys play an important role in customer experience and company success, Kuehnl *et al.* (2019:552) state that marketing practice lacks a

uniform, widely acceptable customer journey definition. The researchers maintain that it is only recently that research focuses on customer's perceptions and evaluations of customer journeys, identifying distinct features, systematically scrutinising a journey's impact on customer behaviour and how to create and maintain thematic cohesion, consistency and context sensitivity of touchpoints (Kuehnl *et al.*, 2019:565,566).

Though literature does not reveal a one-only, widely accepted, uniform customer journey definition, it does indicate a variety of definitions that expose the multilevel and dynamic nature of the concept (Becker & Jaakkola, 2020:631; Towers & Towers, 2021:4). A lack of focussed research into customer journey's is partially to blame for marketing literature not offering a consensus on the variety of definitions (Rudkowski *et al.*, 2020:5). In considering and evaluating some of the customer journey definitions the golden thread that exists and runs through customer experience, service design and customer journeys is exposed.

4.4 CUSTOMER JOURNEY DEFINED

A customer journey represents the sum of experiences that customers go through when interacting with an organisation, its channel to market, its touchpoints, or its brand (Kolsky, 2016:3). Customers are accumulating experiences at these interactions across consecutive touchpoints that comprise the "so-called customer journey" (De Keyser, 2015:33).

Følstad and Kvale (2018:212) contend that the customer journey perspective originates in service design and has not been developed through "theoretically grounded academic inquiry". As service design primarily deals with system complexities, user-centeredness and the objective to orchestrate cues, places, processes, and interactions at company touchpoints (Ostrom *et al.*, 2010:17), it stands to reason that touchpoints will also play a central role in customer journeys. It is this central role of touchpoints that compels Becker and Jaakkola (2020:639) to define a customer journey as a series of touchpoints and customer interfaces across all stages of the service provision process stretching from customer pre-engagement, engagement, and post-engagement with the organisation of choice.

Rudkowski *et al.* (2020:5) also define customer journeys in the context of touchpoints but specifically reference the process nature of journeys. The researchers accentuate the activity of mapping touchpoints across customer pre-purchase, purchase, and post-purchase touchpoints. They acknowledge that, though a strong link exists with the purchase process and activities, customer journeys also relate compellingly to customer's experiences.

Følstad and Kvale (2018:207, 213) also emphasise the process nature of customer journeys in stating that a journey comprises a series of steps along a path of touchpoints or a sequence of events customers go through to obtain a product or service. Journeys should portray a customer-centric character, be evaluated, rated, tried, and accepted by customers. A customer's perspective (not management's) on touchpoints defines a customer journey (Patri'cio *et al.*, 2011:182). Customer journey design should thus be done from the customer's vantage point, including needs and wants, expectations, state of mind, emotional responses, and "barriers and motivators for action" (Varnali, 2019:823).

The symbiotic relationship between service design and customer journey design should not be underestimated. Service designers are compelled to adopt a customer perspective when defining touchpoint and interaction settings, interaction processes and the role of each participant in these processes (Patri'cio *et al.*, 2011:186).

Towers and Towers (2021:18), in defining a customer's journey, emphasise customer engagement at all touchpoints (within and outside management's control) throughout the customers' purchase decision-making processes. Engagements normally elicit customer emotions of satisfaction or dissatisfaction (or neutral). Kranzbühler *et al.* (2019:308) refer to these customer emotions as pleasure or pain moments when describing customer journeys. The researchers regard customer journeys as consisting of a series of touchpoints that customers are satisfied or dissatisfied with depending on touchpoint executions or the inherent nature of the touchpoints.

Norton and Pine II (2013:12) argue that though customer journeys deal with a sequence of events normally d with the marketing sciences, their relevance is not only restricted to marketing. Customer journeys should be treated as a strategic issue and the consequence of a clearly defined strategic plan to deliver value to customers, increasing profit levels and a competitive advantage in the marketplace. Customer journeys should reflect a high level of authenticity; that is, they should be based on actual customer behaviour and modelled in such a manner as to create experiences of value for customers (Norton & Pine II, 2013:13).

Service designers should also focus on customer responses to interfaces in modelling true customer behaviour. The objective is to explore opportunities for designing, applying, and implementing different types of stimuli within the customer journey to guide customers through improving customer responses during service encounters (Becker & Jaakkola, 2020:634). Interactions during service encounters, entrenched in multiple exchanges, contribute to and ultimately determine the customers' experience with the service provider (Tax *et al.*, 2013:454).

In considering the different definitions, approaches, design elements, and pre-requisites associated with customer journeys, the following comprehensive definition of a customer journey is proposed: ***A customer-centric and customer experience driven, purposefully and deliberately process-designed iterative and dynamic customer journey encapsulates and comprises an optimal sequential mix of the sum of multiple, multi-layered, multisensory customer touchpoint encounters, across all stages of a customer-organisation interaction, that elicit and create customer emotions resulting in experiences of value.***

An important pre-requisite to all interactions leading to a valued customer experience remains an in-depth understanding of customer expectations and requirements. This understanding should manifest in customer journey design and all experience contributing factors, including a supportive and conducive store design, an optimal mix of passive and active staff engagements at customer touchpoints throughout the customer's journey.

4.4.1 Customer journeys, touchpoints, and customer experience

A symbiotic relationship exists between service design and customer journey design and between customer experience and customer journeys, hence the reference to the customer experience marketing trinity. Kuehn et al. (2019:553) declare that customer journeys are essential and distinct value drivers for customer experience. Lemon and Verhoef (2016:74) best describe this relationship, referring to the customer journey as the first stage of total customer experience. These researchers argue that customer experience can be conceptualised as a customer's journey through all the stages of customer interaction at all organisational direct and indirect touchpoints. The quality of the experience depends on the customers' emotional judgment of these touchpoints and associated service elements, service interactions, service surroundings, service providers, and interactions with other customers (Chang & Horng, 2010:2405).

Barari and Furrer (2018:235) illustrates the symbiotic relationship between customer experience and the customer journey by defining customer experience as a process (journey) consisting of "a series of sequential activities that start before purchase and continue after purchase". The series of sequential activities are composed at the touchpoint level (Homburg et al., 2017:387) and are referred to as "contact points or encounters that occur between the customer, the brand, the firm and other influencers" that are critical to the design of a customer journey (Rudkowski et al., 2020:6).

Various types of customer touchpoints can be identified throughout all the stages associated with customer journeys. Lemon and Verhoef (2016:76) identify four categories of customer experience touchpoints: brand-owned, partner-owned, customer-owned, and social/external touchpoints.

Acknowledging the four categories provides a framework for market entities to plan, formulate, implement, and manage specific tactics to leverage customer experiences (Lemon & Verhoef, 2016:78).

In referring to customer touchpoints, Rudkowski *et al.* (2020:7) applied a slightly different approach than Lemon and Verhoef's categorisation and identified a series of functional touchpoints customers can encounter. Through a thematic analysis of customer experience and customer journey literature and researchers' own observations, Rudkowski *et al.* (2020:6) identify the following touchpoints: service reviews, advertising, signage, visible environmental elements, service scape elements, staffing, in-store technology, payment options, product and service assortment, post-purchase follow up (engagement) and word of mouth. It is within these touchpoints that cues can be structured throughout the customer journey phases to facilitate customers' sought-after experiences (Rudkowski *et al.*, 2020:7).

De Keyser *et al.* (2020:437,448) maintain that customer touchpoints provide the basis for developing customer journeys and state that existing and desired touchpoints are important building blocks of customer experience. Customer-business interfaces can be dissected into touchpoint stages along a customer journey (De Keyser *et al.*, 2020:440). The sequential nature of customer experience comes to the fore in creating and establishing touchpoint journeys across all stages of customer-organisation interfaces.

De Keyser *et al.* (2020:437) further surmise that every customer journey comprises many touchpoints critical to forming a customer's experience. Customers tend to make value judgements of service providers that function as guides to embark, or not, on a particular customer journey or foster a special relationship with a service provider. The value judgements are based on a combination of various touchpoints (T), the context (C) in which these touchpoints exist, and the quality (Q) delivered by the touchpoints (De Keyser *et al.*, 2020:442). It is this TCQ classification that brings granularity to the definition of CX as nondeliberate, spontaneous responses and reactions to offering-related stimuli embedded within a specific context by detailing (1) the attributes that reflect the nature of the responses and reactions with the qualities (Q) components, (2) the diversity in offering-related stimuli with the touch point (T) components, and (3) the layered nature of the specific context with the context (C) components (De Keyser *et al.*, 2020:442).

Norton and Pine (2013:13) refer to customer journeys as touchpoint journeys and define them as specifically designed strategic interventions to create customer experiences that result in customer loyalty. The researchers describe journeys as comprising key moments staged through descriptive scenes and tactics focusing on maximising customer experiences, patronage and

company performance. Key moments of customer interaction are scripted into touchpoints reflecting scenes (occurrences) specifically designed to create an experience that supports key moments. Key tactics (business processes, protocols, scripts, self-help facilities, employee interactions) support the scenes to guide, enable and produce lasting customer experiences and loyalty (Norton & Pine, 2013:13).

In discussing the customer experience ecosystem Barari and Furrer refer to an all-inclusive customer journey that comprises all stages of the customer-business engagement process across various customer touchpoints (Barari & Furrer, 2018:237). These researchers identify a shortcoming in most customer experience research the focus on direct customer-service provider engagements only (Heinonen *et al.*, 2010:535). Not much consideration is given to interaction stages where the service provider is not directly involved, such as the pre-and post-service provider stages of engagements (Barari & Furrer, 2018:236).

4.4.2 The stages of the customer experience journey

As in the preceding paragraph, marketing literature frequently expresses customer experiences and journeys in the context of customer-business interactions or engagements in specific phases, stages or sequential activities regarded as key customer moments.

Dunn and Davis (2003:36) refer to three stages of customer experience in their discussion of brand touchpoints: the pre-purchase, purchase or usage, and post-purchase. Edelman (2010:65) refers to the customer journey as a 'decision journey' and identifies four decision-making stages: consideration, evaluation, buy, and the fourth consists of enjoy, advocate and bond. In later research, Edelman and Singer (2015:90) refer to the four decision-making stages as the "classic journey" and propose a "new journey" consisting of a more concise consideration stage, no evaluation stage, buy and moving directly into the loyalty loop stage (enjoy, advocate, bond). The new journey commences with an awareness stage followed by a purchase or execution stage, resulting in enjoyment and a longer-term relationship with the interacting business entity.

Farah *et al.* (2019:138) agree with Edelman and Singer's (2015) assessment but choose not to exclude the evaluation stage and reintroduce the stage between the stage's consideration and purchase. The researchers maintain that the evaluation stage remains an important stage that cannot be excluded as it refers to a customer's comparing and considering alternatives before purchasing.

Lemon and Verhoef (2016:76) identify the customer journey stages as iterative and dynamic, comprising a pre-purchase, purchase, and post-purchase phase. Within the three phases, the

researchers distinguish typical customer behavioural traits associated with each phase. The customer's recognition of a need, consideration, and search form part of prepurchase phase. The purchase phase consists of choice, ordering and payment, while consumption, usage, engagement, and service requests form part of the post-purchase phase (Lemon & Verhoef, 2016:77).

Voorhees *et al.* (2017:270) identify the three phases as pre-core, core and post-core service encounter periods that influence customer outcomes. Translating the physical phases into customer engagement and customer value phases, De Keyser (2015:5) identifies the three-stage cycle as anticipation, realisation, and reflection. Neslin *et al.* (2006:96) and Puccinelli *et al.* (2009:16) include a pre-cursor to the three stages and identify "need recognition" as a preceding stage to information search, purchase, and after-sales service stages.

Jain *et al.* (2017:652), in pursuit of a customer value approach, translate customer experience journey stages into value phases and define a value in pre-use, a value in use and a value in the post-use phase. Value in pre-use refers to the pre-purchase stage comprising an investigation, knowledge acquisition and trial or test of a product or service before the acquisition (Edvardsson *et al.*, 2005:149). This phase assists the customer in forming calculated perceptions and adopting specific attitudes before the intended acquisition. The second phase, value in use, refers to the actual acquisition stage of a service or product and the value created during the consumption experience (Jain *et al.*, 2017:653). The final phase, value in post-use, comprises the after-acquisition or post-consumption stage of customer experience. This phase is characterised by after-sales service, including complaints, returns, repairs, maintenance, loyalty programmes, and after-sale customer communication. The holistic integration of all three sequential interface phases determines the overall customer experience (Jain *et al.*, 2017:653).

In conducting relationship marketing research in retail banking services, Loughlin *et al.* (2004:522) argue that experience is more relevant than relationship. In the context of customer experience in banking, Loughlin *et al.* (2004:534) identify three distinct levels of experiences: brand experience, transactional experience, and relationship experience. Brand experiences is defined by Loughlin *et al.* (2004:529) as multi-dimensional and refer to customers' images and perceptions of a business as created and promoted through marketing communications and advertising. Some level of personal interaction and personal experience with a business also form customer perceptions.

Transactional experiences are formed through normal day-to-day encounters or transactions with a service provider. The third stage of experiences relates to the post-purchase/ after-sales service stage, which Loughlin *et al.* (2004:532) identify as relational experiences. Relational experiences

incorporate an interpersonal dimension beyond “superficial interactions with front-line staff” (Loughlin *et al.*, 2004:532). It represents relationships over time with key business staff that have the power to influence service quality and promote long-lasting, sustainable patronage. These experiences resemble the generic customer experience journey stages of pre-purchase, purchase, and post-purchase, although being conceptualised and expressed differently.

Researchers mostly agree on three stages of customer engagement or interaction with organisations but, depending on the context of their research, define the stages differently, as seen in Table 4-2. Customer experience research tends to apply a more holistic perspective on customer journeys that stretches beyond the three stages (in some cases, a fourth stage preceding pre-purchase, purchase and post-purchase can be included). However, focussing on the three primary customer journey stages not only simplifies the sequence of events to be incorporated in touchpoints but also assists with designing customer journeys for experience and makes the customer journey process more manageable (Lemon & Verhoef, 2016:74).

Table 4-2: The stages of the customer experience journey

Dunn & Davis, 2003:36 (Brand perspective)	Laughlin et al. 2004:529 (Experience perspective)	Puccinelli et al. 2009:16 (Buying process perspective)	Edelman, 2010:65 (Decision-making perspective)	Edelman & Singer, 2015:90 (Decision-making perspective)	De Keyser, 2015:5 (Engagement and value perspective)	Lemon & Verhoef, 2016:77 (Behavioural perspective)	Jain et al. 2017:652 (Experience perspective)
Pre-purchase	Brand	Needs recognition	Consider	Consider	Anticipation	Pre-purchase	Pre-use value
Purchase	Transactional	Information search	Evaluate	Buy	Realisation	Purchase	Value in use
Post-purchase	Relationship	Purchase	Buy	Enjoy, advocate, bond	Reflection	Post-purchase	Post-use value
		After-sales service	Enjoy, advocate, bond				

4.4.3 Customer journey design for experience

Customer experience can be conceptualised as a customer’s journey through all the stages or phases of the customer interaction process at customer touchpoints (Lemon & Verhoef, 2016:74; Rudkowski *et al.*, 2020:4). By isolating the three most important journey stages or phases, companies can design customer experiences entrenched in each of the customer journey stages (De Keyser *et al.*, 2020:442). Research by Zomerdijk and Voss (2010:79) emphasises the importance of a holistic journey design. The researchers maintain that the design should include pre- and post-purchase, customer arrival and departure, and emotional aspects such as

anticipation and “post-experience savouring”. In designing these experience journeys, the focus is to elicit customer emotions that promote customer loyalty behaviours (Pullman & Gross, 2004:551).

Holbrook and Hirschman, who have been accredited with the emergence of the concept of customer experience in Marketing (Fatma, 2014:33; Kranzbühler *et al.*, 2018:434; Same & Larimo, 2012:481), argue for a broader view to influence customer emotions by promoting the inclusion of hedonistic elements of consumption that stimulate multisensory gratification (Holbrook & Hirschman, 1982:135,137). Some researchers, such as Edvardsson *et al.* (2005:149), do not equate hedonistic consumption to normal day-to-day customer experiences.

This study suggests the opposite. Hedonistic elements can enhance multisensory customer experiences even in normal day-to-day customer engagements. It should be included in the design of all customer journeys to enable a total customer experience as suggested by this study’s conceptual experience management framework.

The inclusion of emotional design aspects into customer journeys, such as modified aesthetic interface appearances and fluent and engaging interactions are aimed at advancing positive, pleasure, fascination, and aspirational customer emotions (Triberti *et al.*, 2017:1). Aesthetics of environmental factors associated with shopping experiences are important, but journey design should also include fluid interaction flows supported by highly skilled sales agents. The ‘flows’, based on the concept of psychological flow, represent an “optimal experience of total absorption” (Triberti *et al.*, 2017:3). It promotes “intertwined customer emotions over a continuous stream within subjects’ experience” of an event and influence customer’s attitudes toward the event (Triberti *et al.*, 2017:3).

A customer’s attitude towards an event, such as a shopping experience, is typically influenced by three factors (Fatma, 2014:33; Palmer, 2010:198):

1. Cues are designed into the customer journey to convey specific information and influence the customer on a multisensory level. The combination and sequencing of stimuli throughout the customer journey is a determining factor in customer experience.
2. The context within which the customer journey applies specific and purposefully developed cues has the potential to impact customer experiences.
3. Individualised situational variables such as social and cultural factors and previous shopping encounters can influence customer perceptions.

The three factors should be important considerations in the design process that ensue within six experience-centric design guiding principles developed and empirically evaluated by Zomerdiijk and Voss (2010:79):

1. The design should be based on pragmatic service process steps that customers follow through the relevant touchpoints to obtain the required service and perform purchase decisions.
2. The design should include tangible service elements (sensory elements) to influence customer perceptions and behaviour.
3. The design should make ample provision for customer-service agent interactions and engagements that promote enjoyment, feelings of care, friendliness, personal relationships, authentic understanding, and personal connection.
4. The design should contemplate the inclusion of the dramatic (theatre) through sequencing, progression, and duration of events.
5. The design should make provision for situations where customers are close to each other or share a space and resources simultaneously, and such situations should be managed to “maximize the potential positive emotional impact of the service”.
6. The design should provide seamless integration of front-office and back-office support functions.

The researchers state that the purpose of the six propositions is to positively influence customer experience, establish emotional connections and stimulate customer loyalty (Zomerdiijk & Voss, 2010:78).

Applying the design principles supports an effective customer journey design process that guarantees a distinct design addressing the means to achieve the required customer experience (Kuehnl *et al.*, 2019:553). Presenting the customer journey as a network of interfacing and engaging customer/business activities, Tax *et al.* (2013:456) identify seven key roles customer journeys should facilitate and support to be regarded as customer experience driven. In anthropomorphising customer journeys, it should facilitate the role of guide, teacher, coach, personal assistant, expert, financial advisor, and consumer advocate.

In referring to marketplace rituals, Otnes *et al.* (2012:368) identify the roles of translator, persuader, performer, and transporter. A marketplace ritual is presented like a customer journey

“as a planned, symbolic, performative and often repeated activity that providers execute for and with customers, to enhance customer experiences and achieve marketing goals” (Otnes *et al.*, 2012:367).

Designers should consider the anthropomorphising roles across the three stages of customer journey design. These roles can be supplemented and enhanced by adopting from the dramatic arts and design customer journeys with the flow associated with the art of the dramatic, storytelling and marketplace rituals.

4.4.4 The art of the dramatic as a leading indicator to customer journey design

Marketing traditionally focuses primarily on product or object design (Atasoy & Martens, 2016:182). This role changed over time from product design towards the design of experiences. As the boundaries between product and experience design become vague, it increased contemporary creative design practices focussing on the subjective, context and dynamic nature of experiences (Atasoy & Martens, 2016:181; Markopoulos *et al.*, 2016:1).

Pine and Gilmore (1999:97-105) state that in the experience economy, work is a theatre and every business a stage. Experiences occur when retail stores function as stage productions in offering products and services as props through actors (staff) (Pine & Gilmore, 1999:98). Experiences can be equated to a “story” emerging from a customer’s interaction with a service provider and can be crafted by incorporating dramaturgical techniques in customer journey design (Atasoy & Martens, 2011:91; 2016:195). The story, comparable to an experience, consists of people, places and objects that can shape emotions of pleasure, satisfaction, and meaningful experiences (Atasoy & Martens, 2016:189). Storytelling techniques and tools can be used to support the element of communication in customer experience design (Peng, 2017:316). In this context, a customer journey represents a customer’s story where the different phases of the journey can be designed in such a way as to create, facilitate, and mediate a story of a total customer experience (Atasoy & Martens, 2011:91).

Holbrook and Hirschman (1982:135) emphasised emotional effects, such as fun, amusement, fantasy, arousal, and sensory stimulation, as integral to the experiential view, which compelled researchers to suggest that these elements be incorporated into customer journeys. Zomerdijk & Voss (2010:69) acknowledge this by suggesting that the sequence, progression, and duration of events normally associated with visual, literary, and performing arts can be applied in experience-centric service designs to create and stimulate emotional effects during customer interactions.

Customer journey design can be enriched by applying the concept of dramatic structure associated with dramatic arts. Lim and Kim (2018:145) concur with journey events enriched with the dramatic art structure and equate a customer's journey to the Aristotelian plot of drama theory (Atasoy & Martens, 2016:191) consisting of a beginning, middle and end phase. The Aristotelian plot resembles the pre-purchase, purchase and post-purchase phases described by Dunn and Davis (2003:36) and subscribes to the same objectives of understanding and creating mechanisms to instil emotional experiences (Atasoy & Martens, 2016:191).

Within the three phases described by Lim and Kim (2018:146), the dramatic art form can be summarised as an arc-like structure of exposition, rising action, climax, falling action, and dénouement or catastrophe to achieve a particular artistic or emotional effect (Atasoy & Martens, 2011:96; Zomerdijs & Voss 2010:69). Lim and Kim (2018:148) likened these five elements to a theme park process involving fun, amusement, fantasy, arousal, and sensory stimulation and classify the five elements as a "series of beginning, exploration, climax, maintenance, and ending".

The five main elements or phases associated with the dramatic structure are derived from research on dramatic writing and its role in interpreting human motives. Research conducted by Egri (1960:280) depicts dramatic writing as consisting of several elements and stages, including the premise, the environment, a pivotal character, other characters, orchestration, unity of opposites, point of attack, conflict, transition, growth, crises, climax, and resolution. Not only do the three main phases of the dramatic, as identified by Lim and Kim (2018:145) resemble the shopping interaction process, but the dramatic elements also resemble elements associated with a retail shopping experience process.

Grove and Fisk (1983:47) think that applying dramaturgy principles through well-developed vocabulary can facilitate understanding and communication in designing customer journey encounters. It can also be argued that its application may increase "transactional efficacy and customer enjoyment" and build customer loyalty (Otnes, 2012:369). The application of drama and storytelling in marketing, particularly customer experience-centric designs, suggests that each functional step in the structure provides an opportunity to create distinctive customer experiences and memories (Lim & Kim, 2018:145).

Interactions among the three stages of the customer journey, as depicted in Table 4-2, unfold according to the dramatic structure of the service delivery process based on the theatre model, as explained by Lim and Kim (2018:145). The dramaturgy structure or theatre model, as applied by different researchers, summarised in Table 4-3, illustrates key functional phases that relate to

the phases associated with customer journeys and should be considered in the design of customer experience journeys.

Table 4-3: Dramaturgical stages leading indicator to customer experience journey elements

Egri, 1960:280 (Creative interpretation of human motives)	Vos and Zomerdijs, 2007:105	Zomerdijs <i>et al.</i>, 2010:69	Lim & Kim, 2018:147
Orchestration	Physical environment ('stage')	Exposition	Beginning
Unity of opposites	Service employees ('actors')	Rising action	Exploration
Point of attack	Service delivery process ('script')	Climax	Climax
Conflict	Fellow customers ('audience')	Fully action	Maintenance
Transition	Back-office support ('backstage')	Denouncement	Ending
Growth			
Crises			
Climax			
Resolution			

However, it is not only the dramatic arts that provide valuable insights to consider when designing customer-centric journeys. The language of marketplace rituals should also be examined, and its applicability to customer journey design should be considered, evaluated, and modified for inclusion into customer journeys.

4.4.5 Market-place rituals as leading indicators to customer journey design

From the above, it can be surmised that retail shopping can be deemed a customer-provider process. The process is embodied in a customer journey consisting of a sequence of pragmatic service process phases, elements, functional steps, encounters, events, actions, or activities. It can further be surmised that if 'language' can be regarded as a "key strategic element of marketplace rituals" (Otnes *et al.*, 2012:368; Rook, 1984: 279), and it has the potential to convert a customer from a "spectator to participant to consumer" (Sherry, 1988:543), then the retail

shopping process represented by the customer journey, can also be declared a marketplace ritual (Otnes *et al.*, 2012:368).

Customer habits and rituals suggest routinised and repetitive behaviour but are not the same behavioural concepts. Habits are self-centred created repetitions that lack emotional content and symbolic meaning and do not imply a communication language (Amati & Pestana, 2015:229). Rituals are a series of functional steps performed by individuals that suggest emotion, symbolism and cognition and are associated with consumptive experiences and the explanation of purchase behaviour (Neal *et al.*, 2008:3).

Rook defines rituals as a type of expressive, symbolic activity constructed of multiple behaviours that occur in a fixed, episodic sequence and that tend to be repeated over time. Ritual behaviour is dramatically scripted, acted out, and performed with formality, seriousness, and inner intensity (Rook, 1985:252). Holt refers to rituals as the exemplification of “collective, formalized, repetitive, bracketed (in terms of time and space), dramatic, and emotional qualities that characterize consumption activities” (Holt, 1992:213).

Rituals are a formal, scripted system consisting of four behavioural episodes: actor-participants, an audience, scripted episodic behaviour, and ritual artefacts (Rook, 1984:279). In the context of a retail store, it can be surmised that the actor refers to a customer, the participants to store staff and the audience to the shop surroundings where customer-retail interactions transpire. The customer typically conducts a purchase process through a generic purchase script, a structured sequence of tasks that encourages a repetition in behaviour and includes sharing knowledge. The artefacts refer to stimuli, cues or clues incorporated into the customer journey to elicit desired experiences and responses from customers interacting with the retail store (Amati & Pestana, 2015:230, 236).

Research by Otnes *et al.* (2012:371) on market rituals identified six categories of activities that constitute marketplace rituals: greeting, edifying, inciting, parting, celebrating, and gift-giving. These activities promote positive customer experience outcomes that include relational (increase customer satisfaction and customer loyalty), perceptual (change customer perceptions, educate customers, assist in realising customer needs and wants), affective (create positive customer emotions, create community connectedness) and behavioural outcomes (promote ritual co-creation, reduce customer complaints) (Otnes *et al.*, 2012:375).

With the focus on customer experience management (CEM) research on social aspects of marketplace experiences, consumer behaviour and specifically marketplace interactions between customers and retail entities, it stands to reason that customer rituals can be regarded as a key

CEM variable that can enhance customer-retailer interactions. Amati and Pestana (2015:231) acknowledge the important role of rituals in customer experiences and suggest that they can form a platform for innovative retail strategies and tactics.

4.4.6 The dramatic and marketplace ritual experiences and roles expressed as behavioural constructs

The dramatic and marketplace rituals provide valuable leading indicators to what can be considered and incorporated into the design of customer experience journeys.

Customer journey design aims to facilitate actions, behaviours, and experiences of significance by providing meaning and enhancement to customers' lives (Baskinger, 2010). To achieve the desired results, customer journey phases should be designed as “designing verbs instead of nouns” as per the associated behaviours illustrated in Table 4-4 (Atasoy & Martens 2016:183). Journey design should thus be transformed from the design of an entity to the design of action-orientated behaviours inclusive of dramatic art cues, enacting as marketplace rituals, which call for the application of different retail principles, knowledge, skill sets and tools (Baskinger, 2010).

Puccinelli *et al.* (2009:16, 21) state that human behaviour associated with shopping is complex and purposeful, and it dictates the flow of customers' experiences, customers' perceptions, their attitudes and ultimately, their satisfaction with an experience. This complexity stresses the need for a more in-depth understanding of where and how retailers can use what cues in customer journeys to predict and influence customers' behavioural intentions and actions.

A more in-depth understanding of shopping behaviour enriched with dramatic art and marketplace ritual approaches should result in customer journeys that provide more comprehensively defined behavioural constructs, as proposed by Lemon and Verhoef (2016:77) in Table 4-3. This would lead to a taxonomy of retail-orientated behavioural constructs based on different contexts and typologies that can function as an effective platform for a customer-centric experience management framework that supports brand building and innovation (e.g. products, services, channels and business models) (Amati & Pestana, 2015:229, 243).

Table 4-4: Dramaturgical and ritual stages and associated behavioural elements as leading indicators to customer experience journey design

Dramatic (Lim & Kim, 2018:147)	Stages:	Beginning	Progress	Climax	Maintenance	Ending	
	Associated Behaviour:	Define Plan Reserve Join	Explore Participate Prepare	Absorbed Immersion Execute Perform	Monitor Change Update	Conclude Leave Finish	
Marketplace rituals (Otnes <i>et al.</i>, 2012:368)	Stages:	Ludic space: • Display • Divert • Delight • Deify	Interaction: • Back-and-forth reporter • Communication	Marketplace rituals: • Service encounter	Transaction		
	Metaphor	Transporter	Persuader	Performer	Transactor		
	Associated Behaviour:	Greeting	Edifying	Inciting	Gift giving	Celebrating	Parting
Customer Experience (Lemon & Verhoef, 2016:77)	Stages:	Pre-purchase	Purchase		Post-purchase		
	Associated Behaviour:	Needs recognition Consideration Search	Choice Ordering Payment		Consumption Usage Engagement Service request		

Source: Adapted from Lemon & Verhoef (2016:77); Lim & Kim (2018:147); Otnes *et al.* (2012:368)

The objective should be to design customer journeys reflecting a network of interfacing and engaging customer/business activities journey “as a planned, symbolic, performative and often repeated activity that providers execute for and with customers, to enhance customer experiences and achieve marketing goals” (Otnes *et al.*, 2012:367). The journey should facilitate the roles of guide, teacher, coach, personal assistant, expert, advisor, consumer advocate, translator, persuader, performer, and transporter and be further supplemented and enhanced with the flow associated with the art of the dramatic, storytelling and marketplace rituals (Otnes *et al.*, 2012:368; Tax *et al.*, 2013:456).

4.5 SERVICE DESIGN AND CUSTOMER JOURNEY THEORY APPLIED TO THIS STUDY

This study fully endorses the cited customer journey literature that constantly emphasizes that the customer’s journey involves all the stages of the customer interaction process at all organisational direct and indirect touchpoints (Lemon & Verhoef, 2016:74). Disputing this notion of an organisation's end-to-end customer journey could not be found in marketing literature by this study. On the contrary, it is supported and endorsed by numerous marketing researchers, practitioners, specialists, and especially those in the consulting field. Researchers such as Bitner (1992:57), Heinonen *et al.* (2010:539), Otnes *et al.* (2012:367), Edelman and Singer (2015:92), Barari and Furrer (2018:235), Følstad and Kvale (2018:207, 213), Kuehnl *et al.* (2019:553), Hamilton and Price (2019:187), Becker and Jaakkola (2020:639), De Keyser *et al.* (2020:437), Rudkowski *et al.* (2020:5) and Towers and Towers (2021:18) all point out that every customer journey comprises many touchpoints which are critical to the formation of a customer’s experience.

This study acknowledges the above notions but argues that the value customers attach to effectively designed customer journeys across different company touchpoints is as applicable to designing an end-to-end customer journey within the confines of a particular touchpoint such as a retail store. On more than one occasion, Baker *et al.* (1992:445; 2002:120) expressed the need for research or systematic engineering of the most opportune stimuli/clues/cues leading to an optimal mix of retail store environmental, behavioural, and social factors that may influence and promote emotional connectiveness, improve customer experience and store patronage intentions of retail store patrons.

The request from Baker *et al.* (1992:445; 2002:120) is supported by Jones and Vancauwenberghe’s (2014:3), who call for companies to identify the key journeys, investigate and align them to customer expectations, reinforce front-line cultures, optimise operational processes and systems and lastly, define and develop metrics and governance systems for continuous improvement of identified journeys.

This study regards the narrowly defined end-to-end customer journey within a retail store as possibly the most important cornerstone journey within a vastly defined company-wide end-to-end customer journey. It identifies the customer's journey through a physical retail outlet or store as a key journey within which to apply the customer experience philosophy, blended with service design practices and customer journey methodologies, and proposes a pragmatic multifaceted customer-centric framework for a retail store experience journey flow, based on customer expectations. This has the ultimate objective to improve customer experience and thus reduce switching (Ding *et al.*, 2010:6).

The holistic and pragmatic nature of the conceptual retail store-focused experience journey acknowledges and makes provision for all elements and principles associated with an organisation-wide end-to-end customer journey. It incorporates all important principles associated with service and journey design and endorses the quest for customers' cognitive, emotional, social, affective, and physical responses to elicit an emotional engagement (Verhoef *et al.*, 2009:32).

4.6 CONCLUSION

This chapter shows that customer journeys are multilevel and dynamic (Becker & Jaakkola, 2020:631) and should be designed to promote customer loyalty. It should convince customers to repeatedly live through service provider touchpoints by transitioning from pre-purchase to purchase to post-purchase phases as value for customers exists in the touchpoints' cumulative perception (Kuehnl *et al.*, 2019:554,555). Elaborately designed interactive journey touchpoint cues, combined and sequenced into a customer journey (Palmer, 2010:198) should facilitate a positive emotional judgement of the entire customer experience (Chang & Horng, 2010:2404). Customer interaction phases should be designed to optimise management-controlled touchpoints, to leverage non-business-controlled cues and mitigate cues not supportive of the intended customer experience (Becker & Jaakkola, 2020:644).

Zomerdijk and Voss (2010:74) advise that customer journeys should be developed from a customer's point of view. As such, only the encounters that matter to customers should be provided for in the conceptual journey. This implies that journeys should also take cognisance of and provide for customer encounters beyond the service company's control (Kranzbühler *et al.*, 2018:447; Varnali, 2019:826). Care should be taken not to design journeys with an overload of choice and information, as it might lead to customer confusion and decreased personal customer control (Puntoni *et al.*, 2021:135).

The focus on a broader wants-and-needs approach shows a close resemblance to the renowned psychologist Abraham Maslow's hierarchical needs theory, where human needs are in ascending order of significance, culminating into a level of "self-actualisation" (Grant, 1999:400). At the centre of the journey framework should be the "elicitation of transformative experiences" to facilitate sensorial, perceptual, cognitive, and affective customer processes (Gaggioli, 2016:97).

As with dramatic arts and the languages of marketplace rituals objectives, initial customer experience theories were developed around hedonism (Helkkula, 2011:375; Holbrook & Hirschman, 1982:132,135). Holbrook and Hirschman (1982:135) placed emphasis on emotional effects such as fun, amusement, fantasy, arousal, and sensory stimulation as integral to the experiential view that resonates very closely with the dramatic arts. This compelled researchers to suggest that these elements be incorporated into customer journeys.

The quest for designing with verbs instead of nouns (Atasoy & Martens 2016:183) focuses on the elicitation of transformative experiences that calls for a new conceptual framework for the design of self-actualization experiences through customer experience journeys (Gaggioli, 2016:97; Lemon & Verhoef 2016:85). The new conceptual framework, a customer-centric experience management framework, compelled customer journey design to be transformed from the design of an entity to the design of action orientated behaviours (Baskinger, 2010) towards customer self-actualisation and self-transcendence (Gaggioli, 2016:97).

The proposed conceptual framework should not befall the critique of only creating sophisticated experiential contexts but acknowledges that customers are not passive onlookers but searchers for meaning and involvement, allowing interaction and engagement (Chaney, 2018:406). The interaction and engagement between customer and retail organisation, through action-orientated constructs, is at the core of the experiential paradigm that promotes pleasure and meaningful consumption experiences (Chaney *et al.*, 2018:407; Kwortnik & Ross, 2007:325).

The next chapter, building on the three foundational elements of the marketing trinity (customer experience, service design and customer journey), defines and describes the proposed more comprehensive conceptual framework, the customer-centric experience management framework.

CHAPTER 5 CUSTOMER-CENTRIC EXPERIENCE MANAGEMENT FRAMEWORK

5.1 INTRODUCTION

The preceding chapters identified, defined, and described the elements of the customer experience marketing trinity that form the basis for the conceptual customer-centric experience management framework. The three interconnecting elements, a customer experience philosophy (Chapter 3) made practical through the application of service design principles and embedded into the customer journey methodology (Chapter 4), are at the core of this thesis's conceptual customer experience management framework.

This Chapter combines the most salient points extracted from the preceding literature chapters that require some repetition. This provides the origin, platform, and support for the conceptual customer-centric experience management framework. It highlights the framework's roots, confirms the reported void in customer experience research and expresses the need for a retail experience journey flow structure.

The importance of a service concept, service design, deconstruction of a service delivery system and customer experience sustainability resulting from the customer experience marketing trinity forms the core of the experience journey continuum acting as a 'new marketing mix'. This chapter also illustrates the influence of dramatic art, storytelling, market rituals, and human needs on the conceptual customer-centric experience management framework.

The conceptual management framework represents a retail store service system entrenched in a customer journey consisting of an experience continuum of twelve action-orientated constructs proposed as a solution to bridge the customer "Expectation Gap" identified in marketing literature.

The chapter concludes with unpacking each of the 12E constructs around which retail scholars, practitioners and marketing consultants can develop specific tactics for implementation. The 12E constructs form the subject of the quantitative (Chapter 7) and qualitative (Chapter 8) empirical research phases.

5.2 CUSTOMER EXPECTATION GAP

The customer expectation gap results in poor customer experience ratings that originate from the mismatch between customer experience expectations and the experience provided by service providers. Some researchers call it the divide between retail companies' customer-centric words

and non-customer-centric actions (Goldstein *et al.*, 2002:124; Klimek *et al.*, 2017:2; Meyer & Schwager, 2007:119).

This divide causes customer experience strategies, tactics, and interventions not to achieve the intended or expected customer experience results. On the contrary, unacceptable low customer ratings and high customer switching tendencies remain the Achilles heel of many organisations that endeavour to use customer experience as a competitive advantage (Accenture Tenth Annual Customer Pulse Research, 2014; Meyer & Schwager, 2007:119; PWC, 2018; 2018:14; Scott, 2016:18). Over the past two decades researchers constantly refer to the need for retail entities to investigate and improve customer experience ratings as part of the quest to deliver a total customer experience (Baker *et al.*, 1992:448; Hahn *et al.*, 2012:1; KPMG International, 2013:1).

Prokesch (1995:101) postulates that the challenge remains to establish what businesses require to create, manage, and maintain a distinct customer experience that results in an emotional connection with customers, leading towards a sustainable benefit to customers and retail organisations. This study proposes an answer to the challenge identified by Prokesch and to identify the conceptual roots of a solution that proposes bridging the expectation divide between customers and retail organisations.

5.3 COMPANY-WIDE VS TOUCHPOINT WIDE CUSTOMER JOURNEY

As argued in Chapter 4, this study does not disregard the overwhelming evidence in the literature that companies should focus on end-to-end customer journey development. It does, however, posit that the comment from Rawson *et al.* (2013:2) and Bhattacharjee *et al.* (2016:3) that the strength of an end-to-end customer journey is only as good as the worst touchpoint journey deserves more attention.

This study thus values the call from Jones and Vancauwenberghe (2014:3) to identify key journeys, investigate and align them to customer expectations, reinforce front-line cultures, optimise operational processes and systems, and define and develop metrics and governance systems for continuous improvement of identified journeys. De Keyser *et al.* (2020:442) think that different stages can be isolated by dissecting the end-to-end customer journeys, and specific customer experiences can be designed for each stage.

This study subscribes to these notions regarding the retail store touchpoint, the brick-and-mortar retail shop. This is not to compromise the importance of a holistic end-to-end experience design (Zomerdijs & Voss, 2010:79) but intends to strengthen the overall end-to-end customer journey. Especially as research confirmed that retail store environmental elements significantly impact

customer perceptions, behaviour, and experience (Liao *et al.*, 2012:73; Theodoridis & Chatzipanagiotou, 2009:709). It is posited that the customer journey at a physical retail store should be regarded as a key journey within the retail industry.

5.4 ROOTS OF CUSTOMER-CENTRIC EXPERIENCE MANAGEMENT FRAMEWORK

The need for a committed customer-centric experience management framework originates from a research gap to develop and evaluate an integrated conceptual model of customer experience and customer journey (Lemon & Verhoef, 2016:85). The researchers call for the identification of key drivers of customer experience as a broad construct. The research gap compels this study to find the missing links that guide the formulation, implementation and management of more compelling customer experience strategies and tactics. The search for the missing link led to the formulation of the customer experience marketing trinity, which consists of the customer experience philosophy, service design practices, and customer journey methodology. The trinity forms the cornerstone of the conceptual management framework.

The theoretical validation of the conceptual management framework stems not only from the customer experience marketing trinity but also from various customer experience conceptual models formulated by various marketing scholars and researchers spanning three decades. The proposed conceptual management framework was also enriched with principles forthcoming from disciplines such as the dramatic arts, storytelling and marketplace rituals, making it a comprehensive, multifaceted customer experience management instrument. The need for such an instrument has been identified throughout customer experience marketing literature and is being called for by several marketing scholars and researchers to fill a void in customer experience research (Berry & Carbone, 2007:27; Lemon & Verhoef, 2016:70,85; Otnes *et al.*, 2012:368; Voss & Zomerdiijk, 2007:102).

5.4.1 The void in customer experience research

Baker *et al.* (2002:120) state that store environment research generally lacks a comprehensive examination of key issues related to customer experience, store patronage, and perceived merchandise value. The researchers maintain that although some studies offered conceptual and empirical support for various hypothesised relationships, a void exists because it tends to focus only on selected hypothesised links per study (Baker *et al.*, 2002:122).

The statement by Baker *et al.* (2002:122) still holds true, as observed in related research performed over the past three decades by Zeithaml (1988:4), Bitner (1992:60), Vos and Zomerdiijk (2007:11), Verhoef *et al.* (2009:32), Ding *et al.* (2010:8), Fatma (2014:38) and Sheng *et al.*

(2016:4). A common denominator, being regarded as a fundamental requirement, in this and other customer experience research is the need to identify and obtain clarity on customer needs, wants and expectations.

5.4.2 Customer needs, wants and expectations.

Aspiring an emotional connection with customers is only possible with an in-depth understanding of customer's needs, wants, and expectations (Ennis, 2016:153). With Drucker (1954:34) stating that “the customer” is core to every business, it stands to reason that a comprehensive understanding of “the customer” is an essential requirement of any business.

Understanding the customer should provide the basis before any effort is made to plan, design, organise or implement any intervention on customer acquisition, engagement, experience, retention, loyalty, or growth (Kotler, 1988:173). Since the early days of modern marketing theory, organisational strategies, tactics, and objectives evolved around the customer to create, retain, and grow customer bases (Boyarsky *et al.*, 2016:1; Drucker, 1954:34; Pine & Gilmore, 1998:98; Swaim, 2010:3).

In pursuing the customer, marketing theory since 1950 evolved from a focus on buying behaviour, relationship development, service quality, relationship marketing and management, customer-centricity, customer engagement to the most recent focus on customer experience management as a competitive marketing strategy (Drotskie, 2009:110; Lemon & Verhoef, 2016:75). At the core of this marketing strategy is an in-depth understanding of customer needs, wants and expectations serving as a comprehensive platform for the design of retail store cues that function as marketing tools for the provisioning and promotion of strong and sustainable in-store customer experiences (Accenture 2015; Lemon & Verhoef, 2016:69; Verhoef *et al.*, 2009:31).

Researchers and marketing practitioners realised that cues, functioning as marketing tools, have the potential to enable and support the creation of an emotional bond between customer and service organisation (Berry & Carbone, 2007:27; Voss & Zomerdijk, 2007:102). An emotional bond strong enough to influence customer behaviour through which an element of deliberate management control can be instilled (Kotler, 1973:48). This study postulates that the management control resides in an integrated customer-centric framework that provides for a customer experience journey flow structure as illustrated in Figure 5-1.

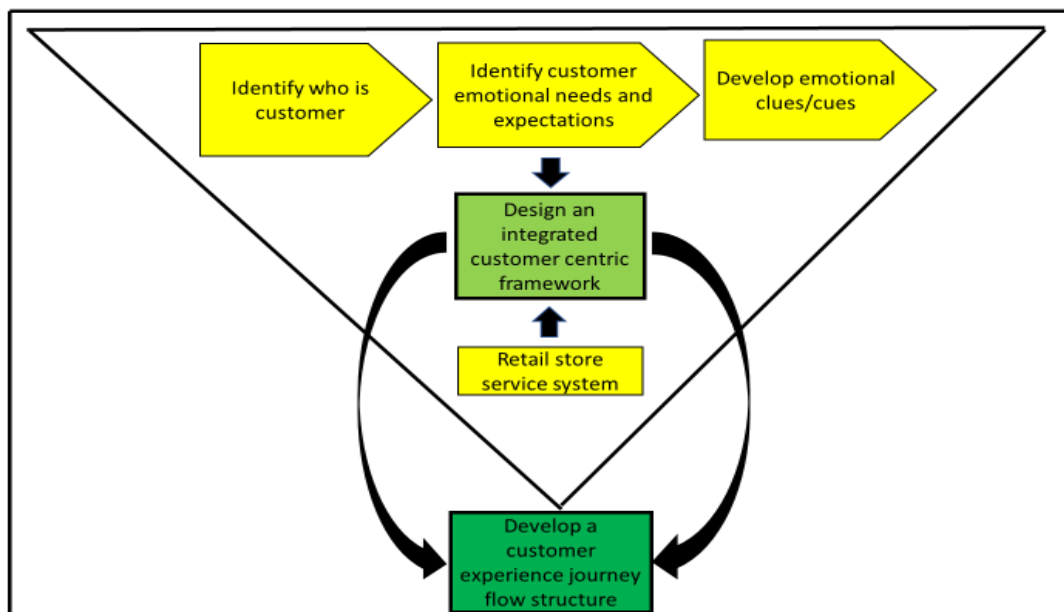


Figure 5-1: Development of a customer experience journey flow structure

Source: Adapted from Ding *et al.* (2010:5); Ennis (2016:153); Johnston & Kong (2011:6); Zomerdijk & Voss (2011:65).

5.4.3 Experience journey flow structure

The need for an experience journey flow structure is identified by researchers Carbone and Haeckel (1994:8-19) and Johnston and Kong (2011:2), who expressed the need for a deliberate focus on creating, staging, and engineering customer experience. Jones and Vancauwenberghe (2014:3) and Maynes and Rawson (2016:3) supported this view and add that an emotional engagement between customer and retail service provider is possible through deliberately staging, facilitating, and managing experiences through a purposefully designed customer journey. In this instance, the customer journey represents the sum of experiences that customers go through when interacting with an organisation, its channel to market, or its brand (Batat, 2019:66; Kolsky, 2016:3).

However, the design of an experience flow structure entrenched in a customer journey is impossible without detailed knowledge and understanding of customers' experience expectations and emotional needs. Without this knowledge, companies will not succeed in developing and implementing appropriate emotional cues at the customer interaction level to target customer feelings and reap the benefits that come with connecting with customer requirements and emotions (Ennis, 2016:153; Schmitt, 2010:86). Nor will companies be able to design a customer-centric management framework based on a well-defined retail service system that supports a customer experience journey flow structure (Ding *et al.*, 2010:5).

In the search for experience journey flow structure, research tends to neglect a detailed focus on the sum of customer experiences throughout a customer's journey and how it affects store patronage intentions. Harris *et al.* (2003:186) acknowledge this shortcoming and state that research focuses more on selected environmental and atmospheric elements. Although evidence exists that physical store environments trigger affective reactions in customers, research results do not adequately extend beyond experience-orientated vocabulary and the generation of ideas (Mohan *et al.*, 2013:1712; Mower *et al.*, 2012:443).

Scott (2016:17) acknowledges the shortcomings in research and adds that it is noticeable that a lot of compartmentalisation exists in research on customer experience, service design and customer journey mapping. In some instances, these philosophies and methodologies are seen as opposing and not complementary (Scott, 2016:17). In recognising these shortcomings, several researchers (Caru & Cova, 2003:268; Johnston & Kong, 2011:2; Klaus *et al.*, 2012:1) called for guiding principles as to what customer experience represents in practise.

Verhoef *et al.* (2009:35) highlight this shortcoming in customer experience research and argue for "additional research to understand how the store environment impacts the customer's experience specifically in a retail context." Schmitt (2011:70) concurs with the need for additional and more comprehensive research and asserts that conceptualised integration along various experience dimensions is required, an objective possible through a purposefully designed and detailed customer journey flow structure.

A limited number of studies, such as Homburg *et al.* (2017:388) and Kuehnl *et al.* (2019:551–568), offer detail on the challenge to create actively and deliberately stage or engineer customer experiences via customer journeys through the application of service design practices. The latter remains a research gap identified by Lemon and Verhoef (2016:85), who highlighted the need for research on linkages between customer experience and customer journeys. Goldstein *et al.* (2002:121) recognised the importance of service design practices and the need for a unified platform to identify linkages. They claim that the missing link lies in an organisation's service concept.

5.4.4 The missing link – the service concept

It is the contention of Goldstein *et al.* (2002:122) that service organisations set customer expectations before, during, and after service delivery. The expectations relate not only to the service package itself but also to what extent the service encounter, the interaction with customers, fits the customer's needs, wants and expectations (Edvardsson & Olsson, 1996:141). The design and delivery of an organisation's service concept plays a critical role in customer

expectation and experience management (Edvardsson & Olsson, 1996:142; Goldstein *et al.*, 2002:123).

5.4.4.1 The service concept defined

This thesis proposes the customer experience management framework with its constituent parts, in the guise of a customer journey, as the missing link in customer experience management. It is postulated that the management framework encapsulates what Goldstein *et al.* (2002:124) define as the “service concept”. The framework intends to mediate between customer needs, wants and expectations and an organisation’s strategic intent to seamlessly provide the expected customer-centric service at a pre-, during- and after-service delivery phase. In the retail service industry, it is not only what you sell but how it is delivered to customers which plays a significant role in business success (Goldstein *et al.*, 2002:124).

Retail customers increasingly regard a seamless shopping experience as a non-negotiable imperative (Gummesson, 1995:250; Tsai, 2010:334). The management framework embodies a seamless shopping experience positioned at the centre of the service concept, as illustrated in Figure 5-2. The conceptual management framework manifests as a service concept that ensures “that the service package and service encounter fit the needs of the customer and the service organisation itself” (Goldstein *et al.*, 2002:122).

As illustrated in Figure 5-2, the management framework proposes to mediate between an organisation’s strategic intent to be customer-centric, focussed on the one side and providing an authentic customer-centric experience to its customers on the opposite side. Facilitating an alignment between the two points can reduce the mismatch between what organisations intend to provide and what customers expect, suggesting an answer to this thesis’s problem statement (Goldstein *et al.*, 2002:131).

In defining the service concept, Goldstein *et al.* (2002:121) specifically referred to “the how and the what of service design”. The how and the what plays an important role in defining the constituent parts of a service. Although the researchers refer to the multi-dimensionality of the service concept, Goldstein *et al.* (2002:131-132) believed that in endeavouring to identify the constituent parts of a service by only referring to the how and what of a service limit identifying all relevant constituent parts of a service delivery system.

Figure 5-2 illustrates the purposeful deconstruction of a service to identify all relevant constituent parts. However, readers should focus on the how and what of a service to understand the service delivery system holistically. It would only then be possible to comprehensively check the identified

components against customers' needs and design and deliver a service matching customer expectations.

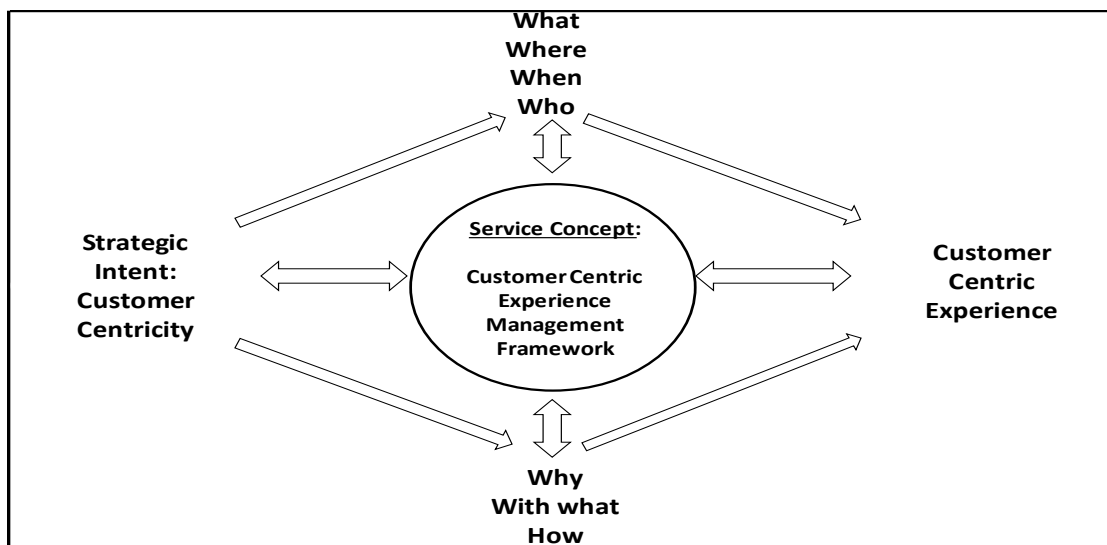


Figure 5-2: Customer-centric experience management framework as a service concept

Source: Adapted from Goldstein *et al.* (2002:124)

5.4.4.2 Deconstructing a service delivery system

Goldstein *et al.*'s (2002) service concept defined the prerequisites that must be present within the service delivery system. These prerequisites are critical to ensure a service with the right quality (Edvardsson & Olsson, 1996:149) and a service that creates a holistic customer service experience (Ostrom *et al.*, 2010:17).

In retail, the service concept typically resides in a customer journey that can influence customer responses and pave the way for a holistic customer experience (Becker & Jaakkola, 2020:640). In deconstructing an organisation's customer journey at each of the three retail customer interaction levels (pre-purchase, purchase, post-purchase), the focus should consistently be on the area and type of service that precipitate the customer's expected and sought-after experiences. The deconstruction should not only be on what and how levels, as suggested by Edvardsson and Olsson (1996:149) and Goldstein *et al.* (2002:121) but should be based on all the levels associated with Sloan's "elements of circumstance" commonly referred to as the "6 W's & 1 H" (Sloan, 2010:239).

Though the what and how of the service delivery system are important, the comprehensive and detailed deconstruction (Otnes *et al.*, 2012:368) of service should also include an analysis of the where, who, when, why and with what, as suggested in Figure 5-2. This is to identify, specify and

define the constituent parts of the service concept. These parts should be incorporated into a customer-centric service delivery package that integrates service interaction components (Goldstein *et al.*, 2002:122).

Dissecting a service into the elements of circumstance (6 W's & 1 H) should enable organisations to design services that are more holistically and comprehensively customer-centric (Scott, 2016:18). It should be aimed to identify the areas of the customer journey interaction processes (Batat, 2019:67) where organisations should develop, implement, and manage interventions and supporting tactics to reduce the customer expectation gap. These areas of circumstance, once identified, should be cohesively designed and integrated to provide for multi-layered, multi-sensory service encounters and cues guiding customers through the three levels of retail customer interactions (Haeckel *et al.*, 2003:21; Zomerdijk & Voss, 2010:68).

Multi-layered and multi-sensory customer encounters are an answer to the call from retail customers to go beyond the augmented product and to provide customers with value-added retail experiences (Spence *et al.*, 2014:472). In a customer experience era, retail customers increasingly demand rich and complex experiences that typically originate from two primary sources. First, retail store atmospherics (design, ambient, social) as described by Baker *et al.* (2002:120) and Duong (2016:3) and second, interaction with customers' senses that affect their perception, judgment and behaviour as described by Schmitt *et al.* (2010:74) and Krishna (2012:333). The objective for retailers in developing their service concept with functional benefits entrenched in a customer journey is to "carefully engage multiple customer senses while keeping the various atmospheric cues congruent" (Spence *et al.*, 2014:483).

Identifying the constituent parts of a customer experience service concept, considering retail store atmospheric and customer sensory experiences, must be preceded by a clear and profound understanding of the foundational roots of such a service concept. This thesis proposes the foundational roots of a sustainable customer experience from three distinct, but overlapping disciplines: the customer experience philosophy, service design practises, and customer journey methodology, labelled as the customer experience marketing trinity.

5.5 SUSTAINABILITY IN CUSTOMER EXPERIENCE

The sustainability of an organisation is one of its critical success factors that requires focused management attention and intervention (Cullen, 2017:429; Porter, 1996:72). Sustainability refers to the ability of an organisational entity to exist and succeed for lengthy time limits (Doane & MacGillivray, 2001:03; Starik & Rands, 1995:909).

The expression gained prominence on the global management platform involving environmental and ecological topics, the “green” agenda (Cullen, 2017:430). In this context, sustainability refers to an organisation's capability to successfully integrate social, environmental, and economic responsibilities (Carter & Rogers, 2008:361). Elkington (1994:3) defines integrating the three responsibilities to achieve sustainability as the “triple bottom line”.

The term “triple bottom line” became synonymous with aspiring to achieve sustainability, and its 3P formulation (people, planet, and profits) finds its way into other areas such as management, operations, and engineering (Carter & Rogers, 2008:361, Cullen, 2017:430; Elkington, 1994:2). In some cases, even governments adopted the triple bottom-line analogy in their policy documents referring to the objective to balance the improvements in customer service, employee satisfaction and financial performance in governing efforts (HM Treasury’s Service Transformation Agreement, 2007:4).

The pursuit of sustainability also made its way into the area of customer experience, where sustainable levels of high customer experience ratings can equate to a retail entity's long-term business survival and success (Cullen, 2017:430; Gentile *et al.*, 2007:395). This study postulates that the sustainability quest through the triple bottom line can be extended to the marketing field to create an optimum level of sustainability in retail customer experiences. In this context, Elkington’s triple bottom line can be substituted by what this thesis defined as the ‘customer experience marketing trinity’ for sustainability in customer experience. It is suggested that to achieve the desired level of sustainability in customer experience, a dynamic equilibrium (Ozanne *et al.*, 2016:250) or wise balance (Sikdar, 2003:1928) be obtained between the three elements of the trinity (Figure 5-3).

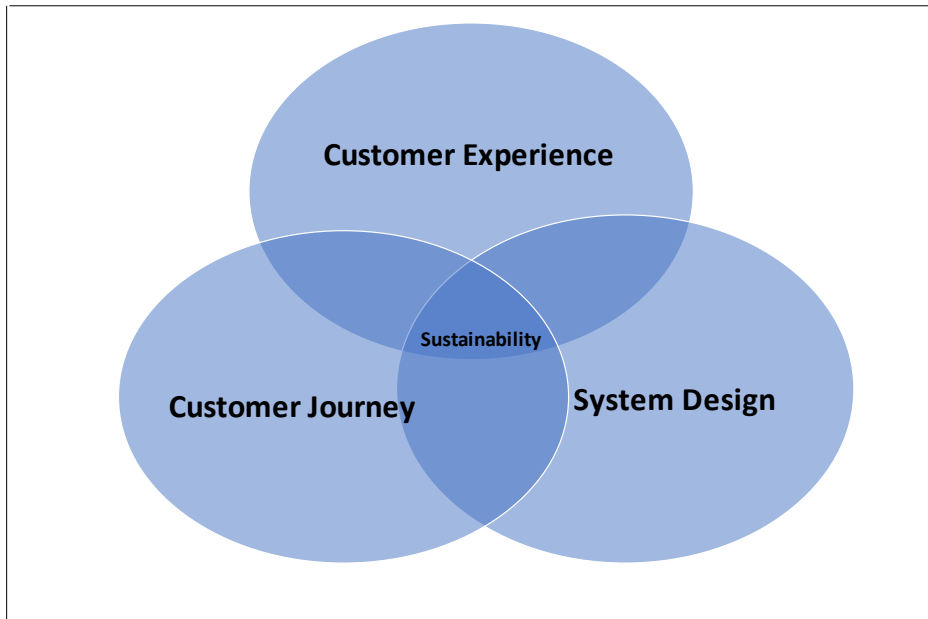


Figure 5-3: Marketing trinity of customer experience sustainability

Source: Adapted from Carter & Rogers (2008:365)

5.5.1 Sustainability through the Marketing Trinity

The benefit of aspiring to a dynamic equilibrium or wise balance between the customer experience marketing trinity elements is that it enables purposeful iterations between the elements. These iterations lead towards learning and creativity opportunities, promoting flexibility and resilience and releasing internal retail human potential (Smith & Lewis, 2011:392). The benefits associated with a state of equilibrium are important in organisational endeavours to aim towards higher levels of sustainability in customer experiences (Smith & Lewis, 2011:393).

A customer-centric experience management framework possesses construct rigidity because it uses three elements in its foundation (O'Driscoll, 2008:98) (see Figure 5-4). A process rigidity that is possible by applying the trinity elements is impossible with the paradoxical nature (Ozanne *et al.*, 2016:250) of the triple bottom line dimensions (Elkington, 1994:3).

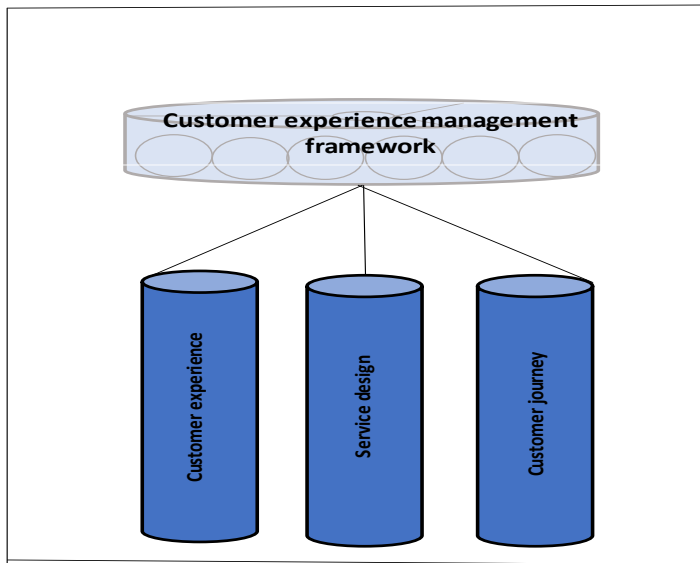


Figure 5-4: Foundations of conceptual customer-centric experience management framework

The conceptual framework results from an integrated approach towards the three interrelated elements of the trinity and suggests implementing and managing an embedded customer experience organisational system (Ozanne *et al.*, 2016:251). The organisational system functions as a service concept consisting of supporting service interaction components that constitute a service package (Goldstein *et al.*, 2002:122) entrenched in the management framework. This service package applies to all three customer-organisation stages associated with a retail customer experience: pre-purchase, purchase (or usage), and post-purchase (Dunn & Davis, 2003:36).

The application of the marketing trinity enables the identification of customer contact points that impact customer experiences, the design or re-design of specific customer experience cues within those contact points and the incorporation there-off into a customer experience continuum (Batat, 2019:145) presented as the customer's journey through a retail entity. The customer journey is an effective methodology to constitute the customer-centric framework as an experience continuum focusing on reducing the perceived gap between customer expectations and customer experiences (Batat, 2019:144; Kuehnl *et al.*, 2019:553).

Some key features of the three elements of the marketing trinity (as identified in preceding Chapters 3 & 4) are henceforth repeated and highlighted to provide an appropriate foundational setting for the conceptual customer-centric experience management framework.

5.5.2 Customer experience philosophy

Pine and Gilmore (1998:98) identified and declared customer experience as an emerging economic offering and the new differentiator in an extremely competitive business environment. The evolutionary development of the customer experience construct since the 1950s, as discussed in Chapter 2, provides an important scholarly basis for understanding the roots of the construct. It also laid the foundation to explore further, in more detail, the experience construct in Chapter 3, which is still shrouded in a cloud of conceptual ambiguity and uncertainty (Klaus *et al.*, 2012:1; Tynan & McKechnie, 2009:502).

Despite the critique regarding the lack of conceptual clarity, multiple definitions, differences in emphases, opinions, or specifically defined research preferences based on differing empirical suppositions (Chaney *et al.*, 2018:408), practitioners, researchers, and scholars agree that customer experience has a direct impact on customer satisfaction, loyalty, and other customer service-related parameters (Kranzbühler *et al.*, 2018:433). They further agree that the customer experience phenomenon is firmly grounded and remains an emerging source of competitive advantage, as postulated by Pine and Gilmore (1998:98), and should, as such, be meticulously managed (Lemon & Verhoef 2016:70; Palmer, 2010:204).

In considering the evolution of the customer experience construct, the conceptual domain of the construct, its constituents, and the fundamental properties of a cross-section of definitions as portrayed in marketing literature, this study surmises and proposes the following integrative definition to be the most representative and encompassing of this all-important construct:

Customer experience represents non-deliberate, spontaneous, subjective, context-specific and transformational multi-sense (emotional, cognitive, behavioural, sensorial, and social) customer impressions, perceptions, judgements of value and responses and reactions to internal and external elements (shop design, service staff behaviour, products and services, self-help technologies, access to information, customer participation, prevailing macro-economic environment) through the customers' conscious/unconscious screening of stimuli encountered during direct and indirect exchanges with a market provider throughout the total shopping journey (searching, purchasing, consumption and after-purchase), aimed at touching the customer in an intrinsic personal manner that leads to a positive, participative, and long-lasting relationship that is appealing and beneficial to both customer and market provider.

The integrated definition emphasises the most important customer experience constituents considered when proposing the integrative customer experience management framework (De Keyser, 2015:12). A framework inclusive of experiential clues at various retail store customer

touchpoints eliciting specific consumer experiences that can impact consumer behaviour in the short- and long-term (Schmitt *et al.*, 2010:100). The conceptual service designed framework provides more structure to the customer experience philosophy and function as a point of departure for the next level of customer experience knowledge development (De Keyser, 2015:14).

The proposed definition provides a basis to conceptualise experiences along a variety of experience dimensions that inter-alia includes “sensory-affective, cognitive-intellectual and behaviour and action-orientated components” (Schmitt, 2010:70). It acknowledges that customer experience be regarded as a process (Barari and Furrer, 2018:235) that can be designed, constructed, staged, and created through applicable service design techniques (Heinonen *et al.*, 2010:540).

5.5.3 Sustainability through service design

Ostrom *et al.* (2010:17) define service design as “the orchestration of clues” that create customer and stakeholder experiences. Bitner (1992:65) and Kotler (1977:50) argue that intentional control and structuring of environmental clues, integrated and displayed in the design of physical retail store environments, can facilitate a customer’s experience.

An integrated design and layering of consistent, cohesive clues should be incorporated to support each of the management framework constructs to elicit the desired customer experience (Berry *et al.*, 2006:44; Haeckel *et al.*, 2003:22). In this regard, three broad categories of clues should be considered as identified by Haeckel *et al.* (2003:20) that can form part of an experience orientated management framework, functional, mechanic and humanistic clues.

The three broad categories of clues should be aimed at humanising service experiences through the application of design methods and techniques enabling a retail store to influence customer emotions and experiences (Mieinen *et al.*, 2016:81). Alternatively, as stated by Pullman and Gross (2004:551), the purpose should be to create an emotional connection with customers through careful planning and designing of tangible and intangible retail store service elements.

Human-centred design provides retail stores with the capability to elicit new service ideas through a human-centred and holistic customer experience design thinking approach incorporated into the conceptual management framework (Lieberman, 2021:222; Patrício *et al.*, 2018:3). The objective is to influence customer emotions and experiences, as stated by Mieinen *et al.* (2016:81), but also to enhance customer loyalty and provide an experience incentive to customers to repeatedly choose the organisation’s touchpoint journey from pre-purchase to post-purchase.

The conceptual management framework, posing as the customer journey, consists of customer touchpoints designed in “a thematically cohesive, consistent, and context-sensitive way” across multiple service marketing, service operations, and interaction design disciplines (Homburg *et al.*, 2017:386; Kuehnl, 2019:553, Patri´cio *et al.*, 2018:3). The framework acknowledges customers cognitive, affective, emotional, social, and physical responses to retailers (Giacomin, 2014:610; Lemon & Verhoef, 2016:70) and implies service constructs incorporated into a management framework (products, services, systems, processes) that are “physically, perceptually, cognitively and emotionally intuitive” (Giacomin, 2014:610).

Lieberman’s (2021:220) four principles in designing service-facing interfaces to develop and implement a customer experience continuum of interface activities have been considered in the formulation of the conceptual customer-centric experience framework. The following principles facilitate the context for and development of internal retail store capabilities to deliver meaningful human centered experiences:

1. The conceptual management framework includes all aspects of the retail store customer lifecycle, an end-to-end design of the pre-purchase, purchase, and after-purchase processes.
2. The management framework focuses on creating open experiences to enable personalised interactions and provide for more differentiation opportunities, which is not always possible with closed proprietary customer systems.
3. The management framework acknowledges that human behaviour is inconsistent, and resiliency is designed into experience constructs.
4. The management framework allows for actual customer behaviour evidence as received from customers and observed during interactions throughout the customer engagement processes and provides opportunities for innovation of the framework continuum.

Literature suggests that a possible solution to emotional engagement between customers and retail service providers lies in a customer-centric management framework implemented through an enabling tool for lifetime value creation defined as the “customer journey” (Maynes & Rawson, 2016:3). The need, as expressed by Bolton *et al.* (2014:253), is for companies to redirect an exclusive performance orientated focus towards incorporating a focus on customer journey design. This hybrid approach provides a more comprehensive and complete customer experience and acknowledged in the conceptual management framework.

5.5.4 Sustainability through a customised customer journey

A customer journey represents the sum of experiences that customers go through when interacting with an organisation, its channel to market, the customer touchpoints within a channel and its brand (Kolsky, 2016:3). Patri'cio (2011:186) concurs with this assessment of customer journeys and state that it determines the level of service experience and ultimately the customer's experience. Kimbell (2011:44) maintains that a noticeable trend exists in the marketplace in that experiential service designs are approached mainly from a customer journey perspective.

In considering the different definitions, approaches, design elements and pre-requisites associated with customer journeys as derived from the literature study, the following comprehensive definition of a customer journey is proposed on which the management framework is based:

A customer-centric and customer experience driven, purposefully and deliberately process-designed iterative and dynamic customer journey encapsulates and comprises an optimal sequential mix of the sum of multiple, multi-layered, multisensory customer touchpoint encounters, across all stages of a customer-organisation interaction, which elicit and create customer emotions resulting in experiences of value.

The sequential nature of customer journeys provides a conceptual management framework consisting of a series of activities (a continuum) at the retail store touchpoint level (Homburg et al., 2017:387) that starts before purchase and continues after purchase. The management framework illustrates the symbiotic relationship between customer experience and the customer journey (Barari & Furrer, 2018:235) and highlights the importance of retail store encounters in creating an experience (Rudkowski et al., 2020:6).

The series of activities associated with the management framework represents a customer decision journey in which Edelman and Singer (2010:65) identify four decision-making stages: 1) consideration, 2) evaluation, 3) buy, and 4) entering the loyalty loop consisting of three elements, enjoy, advocate and bond (Edelman & Singer, 2015:90). The conceptual management framework suggests that retail customers be guided and assisted, through tailor-made retail tactics, through each of these decision stages as it is highly influential in experience creation.

Retail tactics associated with each customer journey decision stage should be designed and implemented to support the core characteristics related to customer experience, as identified by Gentile et al. (2007:397). Core characteristics include the temporal nature of retail tactics that should be flexible, evolve with customer needs and wants, and be amended with customer feedback. The personal nature of a customer's experience should guide and inform interactions

with customers, and engagements should be holistic (rational, emotional, sensorial, physical, spiritual) to create a total experience (Gentile *et al.*, 2007:397).

The marketing trinity, consisting of customer experience, service design and customer journey, acts as the foundational setting and basis for the conceptual customer-centric experience management framework. The management framework is detailed next.

5.6 CUSTOMER-CENTRIC EXPERIENCE MANAGEMENT FRAMEWORK

The marketing trinity provides the basis for formulating, implementing, and managing the customer-centric experience journey management framework (Ozanne *et al.*, 2016:251). Embedded in each of the three trinity element's definitions are key factors that play a directional role in the design of the stages customers experience in their retail store experience (Li & Kim, 2018:149).

The key factors associated with the marketing trinity elements assist in analysing the “experiential world of the customer”, devising an experience platform for a retail store encounter, and guiding the implementation aimed at closing the perceived expectation gap that exists between customer and retail entity (Schmitt, 2010:88). The platform provides for a framework of action orientated constructs (Schmitt, 2010:70) associated with each of the customer-retail store interactional stages. These constructs were benchmarked against conceptual customer experience frameworks formulated by various customer experience researchers over three decades and presented as a customer experience continuum.

5.6.1 The need for an experience journey continuum

Research has shown that customer loyalty resides in satisfying customer needs and wants and how retailers effectively and emotionally relate to customers through pleasurable interactions (Pine & Gilmore, 1998:104; Pullman & Gross, 2004:557).

Customers' aspiration for ultimate consumption experiences through optimal levels of physical, cognitive, behavioural, and emotional engagements gives rise to the concept of continuum in marketing (Batat, 2019:144). This aspirational need of customers expresses the importance of the cross-functional integration of organisational elements at a customer-facing front-end level, such as a retail store (Payne & Frow, 2005:168). The customer experience journey continuum proposed in this thesis shows when and how a retail shopping process can be experienced as a journey with the potential to shape customer experiences (Hamilton & Price, 2019:190).

Batat (2019:144) maintains not fulfilling the aspirational needs of a customer can lead to a “discontinuity” that results in customers not living “the ultimate consumption experience they were expecting because of the discontinuity in the experiential process”. Restoring this link requires customer experience to be expressed as a continuum, implying a cross-functional integration of retail store elements (Batat, 2019:144; Payne & Frow, 2005:168).

This study acknowledges the importance of restoring the identified discontinuity as it lies at the core of the thesis’s problem statement. The experience management framework proposed in this study, with its foundational roots nested in the marketing trinity, is presented as a plausible solution to the problem statement. The framework represents a retail store service system entrenched in a customer journey consisting of an experience continuum of twelve action-orientated constructs proposed as a solution to the thesis’s problem statement (Figure 5-5).

5.6.2 The experience continuum as the new marketing mix

The experience continuum of twelve action-orientated constructs is illustrated in Figure 5-5. The continuum of constructs proposes an answer to the challenge faced by marketing researchers, specialists, and practitioners to identify and understand drivers of experiences, enabling the design of “customer experience as a continuum that includes both extra- and intra-domestic experiences” (Batat 2019:143). The experience continuum proposes to be a solution to simplify activities associated with the retail shopping process and present the sequential activities (constructs) as a natural, harmonious, rational, and efficient retail customer journey flow (Gruber *et al.*, 2015:5).

The flow illustrated in the proposed continuum allows for functional, purposeful, engaging, compelling, and memorable experiences and presents absorption, personal control, joy, values, spontaneity, and a newness of perception and process (Pullman & Gross 2004:553,557). These experiences are important in retail stores where interaction between customers, the store environment and retail staff influence emotions, perceived value, and satisfaction (Gruber *et al.*, 2015:5)

The proposed experience continuum embodies twelve drivers of experience that consist of sensory-affective, cognitive, intellectual, behaviour and action-oriented components (Schmitt, 2010:70). These components are engrained in a combination of processes, activities, physical elements, and people skills, integrated in such a manner as to portray a deliberate ‘planned’ or ‘designed’ customer-centric experience continuum (Goldstein *et al.*, 2002:121). The proposed drivers form a synergistic journey logic where all are considered concerning one another to prevent a silo effect and promote a complete retail store experience (Homburg *et al.*, 2017:388)

The continuum addresses the void expressed by Hahn *et al.* (2012:3), Johnston and Kong (2011:2), Pullman and Gross (2004:554) and Carbone and Haeckel (1994:8) that experience design does not receive the attention it deserves. It also contributes to the research need for a better understanding of the key drivers influencing customers at various stages of the customer journey (Lemon & Verhoef, 2016:85). It furthermore endeavours to suggest a basis from which a more unified view can be developed counter the confusion among researchers regarding the operationalisation of the customer experience journey concept in retail stores (Becker & Jaakkola, 2020:630; Chaney *et al.*, 2018:408).

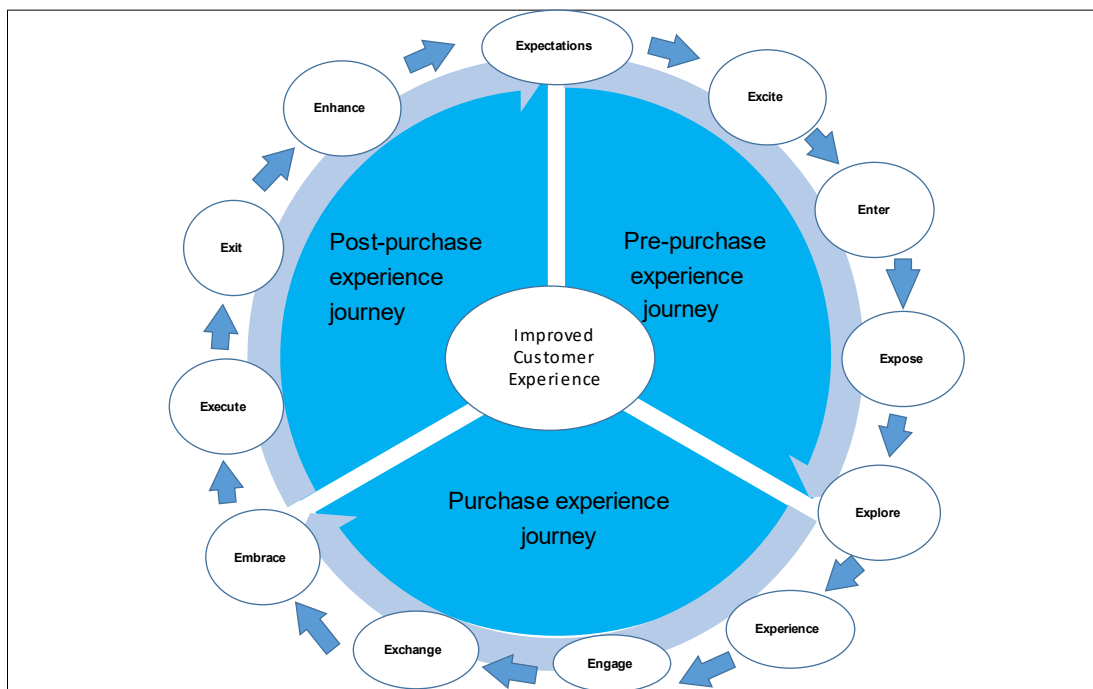


Figure 5-5: Conceptual customer-centric experience management framework

The results of experiential marketing research by Batat suggest a basis towards a more unified view on the operationalisation of the customer experience concept by proposing a customer experience continuum consisting of seven constructs (7E's) described as the new experiential marketing mix (Batat, 2019:143). The 7E's (Experience, Exchange, Extension, Emphasis, Empathy capital, Emotional touchpoints, Emic/etic process) are put forward as controllable elements that can be used as a basis for the design of "suitable, emotional, and profitable customer experiences" (Batat, 2019:258).

Though the new experiential marketing mix's 7E's provide for a sound approach in designing customer experiences, it falls short of adequately addressing Otnes *et al.* (2012:368) concern that the range of interactions customers experience in the marketplace is covered insufficiently in customer experience literature. The researchers state that marketing literature fails to identify, in

sufficient detail, the key retail elements of customer interactions and how they differ across interaction experiences (Otnes *et al.*, 2012:368).

This study acknowledges the validity of the conceptual premises used in formulating the new experiential marketing mix's 7Es formulation but proposes a customer journey perspective on a customer experience continuum. The study's framework of twelve customer experience-related constructs (12Es) proposes to identify the key retail elements associated with retail stores (Otnes *et al.*, 2012:368). The twelve constructs relate to key retail shopping elements that personify retail encounters as sequence-related events. It represents an experience continuum made practical through an intentionally service-designed customer journey (De Keyser *et al.*, 2020:440) based on sensory marketing and behavioural science principles and constructs. It personifies a continuum of action-orientated constructs (Verhoef *et al.*, 2004:54) that can assist retail research scholars and practitioners to better understand, develop, present, and implement customer-centric retail strategies and tactics advancing customers' experiences in retail stores (Amati & Pestana, 2015:243).

The 12E-constructs that form the basis of an intentionally designed customer journey accentuate the sequential nature of retail customers' consumption experiences. The constructs, composed of stimulus characteristics, context, and situational variables, encapsulate consumption experience characteristics associated with all the stages of a typical retail in-store shopping process (Fatma, 2014:33; Terblanche, 2018:56).

5.7 CONCEPTUAL FOUNDATIONS OF THE 12E EXPERIENCE CONTINUUM

The proposed customer experience continuum will impact a customer's in-store retail experience. It symbolises the customer's journey through all three stages of the shopping process. The experience continuum is made practical through an experience management framework consisting of the 12E constructs associated with the continuum.

The customer experience continuum, represented by the experience management framework, stems from the symbiotic relationship between the three elements of the marketing trinity: the customer experience philosophy, service design and customer journey methodology. Experience constructs were formulated from this symbiosis applicable to each generic retail shopping process stage.

Not only were the constructs validated against customer experience conceptual models found in the marketing literature (Baker *et al.*, 2002:121; Bitner, 1992:60; Ding *et al.*, 2010:103; Fatma, 2014:38; Terblanche, 2018:56; Sheng *et al.*, 2016:4; Verhoef *et al.*, 2009:32; Vos and Zomerdiijk,

2007:105; Zeithaml, 1988:4) but also enriched by experience constructs inferred from the dramatic arts, market rituals, storytelling, and confirmed by the human needs that motivate action.

This approach has as an end goal to support and strengthen Batat's (2019:143) notion of influencing companies "to broaden their vision by shifting the focus from the "P" of "Physical environment/Place" in the traditional marketing mix logic to a more extended consideration of customer experience that is dynamic, evolving, and goes beyond the physical environment".

5.7.1 Retail shopping process

Retail entities must have a thorough understanding of consumption experience characteristics and how it is impacted throughout all the stages of a retail shopping process (Batat, 2019:66). Identifying and dissecting the stages of the in-store retail shopping process is a prerequisite for an experience continuum that represents retail consumption experience characteristics.

The three stages of an in-store retail shopping process, identified by Dunn and Davis (2003:36), around which the 12E experience continuum is formulated, involve a pre-purchase, a purchase, and a post-purchase stage (Figure 5-6). These three stages are explained by Voorhees *et al.* (2017:270) in the context of service experience "We define service experience as the period during which all service encounters relevant to a core service offering may occur. This concept comprises pre- and post-core encounters and the encounters built into the core service provision as moments of truth that influence customer outcomes. This conceptualization widens the lens through which we view service experience by highlighting the periods of pre-core, core, and post-core service encounters."

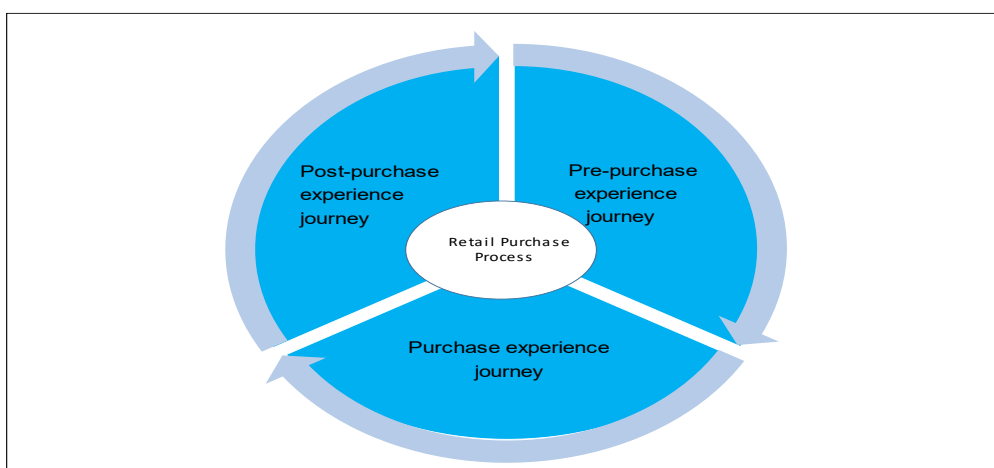


Figure 5-6: Retail purchase process stages

Source: Adapted from Dunn & Davis (2003:23)

Many experiences flow from interactions during a customer's journey through a series of retail store touchpoints across all three stages of the retail shopping process (Becker & Jaakkola, 2020:639). De Keyser *et al.* (2020:442) believe that by isolating the three stages, specific customer experiences can be designed for each stage, as illustrated in Figure 5-5. This can be done without compromising the importance of a holistic experience design as called for by Zomerdijk and Voss (2010:79).

The process followed to identify the experience continuum constructs originates from research done by Goldstein *et al.* (2002:124) that suggests a deconstruction of the retail shopping process into the what and the how or into its components. Deconstructing aims to "identify the various elements of a service concept, check them against customers' needs, and then design and deliver them". The latter part of this process, the design and delivery phases, materialises via a customer journey characterised by a service concept.

The 12E experience continuum, as illustrated in Figure 5-5, resulted from adopting Goldstein *et al.* (2002) deconstructing tactic and applying it across the three stages of the retail shopping process, promoting a dynamic customer experience (Lemon & Verhoef, 2016:74; Rudkowski *et al.*, 2020:4)

In deconstructing the stages, service constructs were individually linked to each stage, posing as leading indicators or drivers for identifying the 12Es associated with each stage. The pre-purchase stage was regarded as invitational value positions to engage, the purchase stage as engagements and the post-purchase stage as service experience (Chandler & Lusch, 2015:6).

The constructs in Table 5-1 capture a customer's daily retail shopping routine and include various in-store interactions (Hamilton & Price, 2019:187; Heinonen *et al.*, 2010:539). The important role of these in-store interactions and the retail store environment (Duong, 2016:3), in which the 12E constructs are sequenced together, has the potential to influence customer experiences within a retail store positively. It can also serve as a platform for a much-needed competitive operational customer interaction strategy for physical store-based retailers in the competitive world of retailing.

Table 5-1: Experience constructs related to shopping process stages.

The 12E constructs cited in the three stages of an in-store retail shopping proses		
Pre-purchase	Purchase	Post-purchase
Expect	Explore	Exit
Excite	Experience	Enhance
Enter	Engage	

The 12E constructs cited in the three stages of an in-store retail shopping proses		
Pre-purchase	Purchase	Post-purchase
Expose	Exchange	
	Embrace	
	Execute	

5.7.2 Theoretical validation of 12E constructs

Research confirmed that retail store environmental factors (layout, staff knowledge and attitude, product variety, displays) have a significant impact on customer perceptions, behaviour, and experience (Liao *et al.*, 2012:73; Theodoridis & Chatzipanagiotou, 2009:709). Contrary to the importance of these factors and the important role of retail space, as argued by environmental psychologists (Grewal *et al.*, 2003:262), little focused research exists on the systematic engineering of an optimal mix of retail store environmental, behavioural, and social factors (Baker *et al.*, 1992:445).

The optimal factors mix remains a priority because the important aspects of shopping include understanding customer expectations and requirements, store design, a mixture of passive and active staff interactions, and quality of interactions (Baker *et al.*, 2002:120, 122). Kim *et al.*'s (2016:5813) study builds on the Baker *et al.* store choice model by expanding and articulating the store choice criteria as perceived in-store service quality dimensions. The perceived service quality dimensions, as identified by Kim *et al.* (2016:5813), serve as a basis for the expansion to service quality dimensions and are extended into an in-store service quality customer journey (Figure 5-7) aligned to retail store environmental and in-store patronage elements found in the marketing literature (Baker *et al.*, 2002:121).

The store choice model, formulated by Baker *et al.* (2002:121), integrates cognitive and environmental psychology theories and shows that retail store environmental dimensions influence customer decision-making. These researchers maintain that customer store choice criteria are influenced by expectations and perceptions about interpersonal service quality, merchandise quality, monetary price, time and effort costs, and psychic costs (Baker *et al.*, 2002:121, 122). All are antecedents of store patronage intentions (Baker *et al.*, 2002:138).

The model on customer emotions by Kim *et al.* (2016:5811, 5813) postulates that customer expectations and behaviour are influenced by perceived service quality dimensions that include interaction, service capes, policy, problem-solving and reliability. These dimensions impact

customer emotions, influence customers' evaluation of the shop's service quality and determine customer behavioural responses (Kim *et al.*, 2016:5810), including in-store patronage intentions.

Store choice criteria and customer emotional triggers, augmenting as in-store service quality dimensions, are directly or implicitly, to a lesser or greater extent, incorporated into one or more of the proposed 12E constructs. The 12E constructs represent a network of interfacing and engaging customer-organisation activities (Tax *et al.*, 2013:456) translated into twelve events related to a real-retail-life service environment (Verhoef *et al.*, 2004:61).

Figure 5-7 displays the twelve events (constructs) synthesised with a value chain consisting of store environment (customer, design, and social factors), service quality and in-store patronage (satisfaction, experience, and re-patronage elements) as postulated by Baker *et al.* (2002:121).

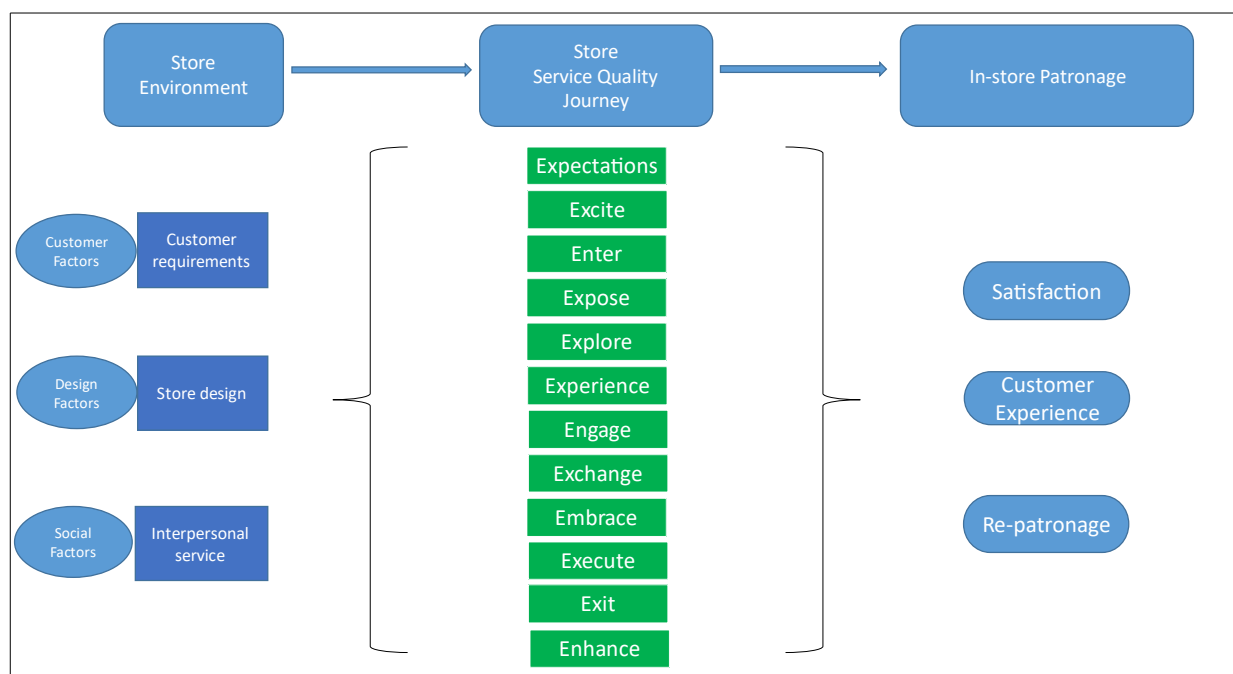


Figure 5-7: A conceptual customer-centric store management framework based on store environmental and service quality constructs.

Source: Adapted from Baker *et al.* (2002:121) & Kim *et al.* (2016:5813)

The twelve retail-focused service quality constructs can potentially create an experience that can convert a customer from a spectator to a participant to an engaged consumer, resulting in customer satisfaction, a distinct experience and sustained store patronage (Sherry, 1988:543).

As illustrated in Figure 5-7, the continuum of quality constructs represents a chain of retail store customer relations (Edvardsson & Olsson, 1996:142), where each activity and service encounter are important to a quality retail experience. The constructs are closely related to the quality

dimensions of the SERVQUAL model developed by Parasuraman *et al.* (1988:34). The SERVQUAL quality dimensions (tangibles, reliability, responsiveness, assurance, and empathy), as identified by Parasuraman *et al.* (1988:34), are intrinsically implied in the 12E retail store experience constructs.

The study's conceptual experience management framework relates to Baker *et al.*'s (2002) store choice model by articulating the store choice criteria as in-store service quality constructs staged as a retail customer experience continuum. The 12E continuum is in response to a market need to identify key customer experience components, critical linkages between components and moderators incorporated in various customer experience conceptual models developed by multiple marketing researchers over the past three decades (Lemon & Verhoef, 2016:85).

5.7.3 Management framework concerning other conceptual experience frameworks

Considering a cross-section of customer experience conceptual frameworks from different researchers over three decades (Table 5-2), it can be surmised that Baker *et al.*'s (2002:122-141) comprehensive store choice model is influential in most of the models. The conceptual frameworks consider the store environment and choice criteria as leading indicators of customer patronage intentions. It furthermore acknowledges that a relationship exists between social, design and ambient environmental cues and customer store choice criteria (service quality, shopping experience costs, and merchandise value) and that this relationship influences customer patronage intentions.

The store constructs included in the conceptual experience management framework (Table 5-2) are consistent with the 'Netscape dimensions' in "services capes", as described by Bitner (1992:58,60,64). It incorporates insights from the inference, schema and theory of affordances that should be accounted for in a retail store environment (Baker *et al.*, 2002:122). These theories collectively suggest that customers assess design, social, and ambient environmental cues during a retail shopping process as an indication of the levels of quality, price, and overall shopping experience (Baker *et al.*, 2002:122; Bitner 1992:64). The nature of the proposed 12E store constructs is such that management can design, implement, measure and redesign environmental cues appropriate to each of the constructs that have the potential to influence customer experiences positively.

It is evident from Table 5-2 that the pre-cursors to Baker *et al.*'s (2002) research were research conducted by Zeithaml (1988) and Bitner (1992). This study posits that the conceptual frameworks formulated by the three researchers can be regarded as some of the most important pioneering work done on conceptual frameworks applicable to customer experience. Subsequent conceptual

frameworks by Vos & Zomerdiijk (2007), Verhoef *et al.* (2009), Ding *et al.* (2010), Fatma (2014) and Sheng *et al.* (2016) all build on the initial research done by the mentioned three researchers.

The customer experience conceptual frameworks in Table 5-2 provide the impetus for the customer-centric experience management framework proposed by this study. The conceptual frameworks display the cues' design, implementation, assessment, and management dimensions. As these clues are inherent in creating a customer service experience, its "systematic and careful orchestration" throughout the customer's retail shopping journey creates desired and memorable customer experiences (Berry *et al.*, 2006:53,54; Patri'cio 2011:186; Pine & Gilmore, 1998:103). In simplistic terms, Lemon and Verhoef (2016:74) state that customer experiences are formed and influenced by a customer's journey throughout encounters and interactions with retail store cues.

With the proposed 12E constructs as guiding elements, retail management should formulate construct cues to affirm the nature of the construct-experience and to create the desired customer impression to positively influence customer experiences (Pine & Gilmore, 1999:103) In considering, for example, the *Explore* construct, the aim is to formulate appropriate cues for customers to *explore* and assess retail store constructs (highlighted areas as per Table 5-2) that can influence a customers' value perceptions and total experiences regarding (Schmitt, 2010:81,89):

- price, quality, and value (Zeithaml, 1988:4)
- store ambience, space, signs, symbols, and artefacts (Bitner, 1992:60)
- retail staff, store design and ambient factors/features/facilities (Baker *et al.*, 2002:121)
- physical environment (Vos & Zomerdiijk, 2007:105),
- assortment and retail atmosphere (Verhoef *et al.*, 2009:32),
- retail process and control features (Ding *et al.*, 2010:103),
- service interfaces (Fatma, 2014:38),
- store ambient, design, social features, service scape engagement dimensions, and surroundscape dimensions (Sheng *et al.*, 2016:4).

Table 5-2: Conceptual customer-centric experience management framework in relation to other conceptual frameworks for customer experience creation

Sequence of Constructs	Proposed Store Constructs	Customer experience constructs							
		Zeithaml (1988)	Bitner (1992)	Baker <i>et al.</i> (2002)	Vos & Zomerdiijk (2007)	Verhoef <i>et al.</i> (2009)	Ding <i>et al.</i> (2010)	Fatma (2014)	Sheng <i>et al.</i> (2016)
1	Expect					Pre-customer experience (t-1)		Pre-experience activities	
2	Excite				Physical environment	Retail atmosphere	Product variety	Pre-experience activities Physical environment Brand performance Service interface	
3	Enter				Physical environment	Retail atmosphere Assortment Price & promotions	Product variety	Physical environment Brand performance Service interface Price & promotions	
4	Expose				Employees Service processes	Service interface	Process features	Service interface	
5	Explore				Physical environment	Assortment Retail atmosphere	Process features Perceived control	Physical environment Service interface	
6	Experience				Service employees Service delivery process	Atmosphere Assortment Service interface, Social	Perceived control Skill	Physical environment Service interface	
7	Engage				Service employees Service delivery process	Service interface Social (other customers)	Challenge Focused Attention service quality	Service interface Social environment	
8	Exchange				Service employees Service delivery process	Service interface Social (other customers)	Interactivity challenge Service quality	Service interface Social Environment	
9	Embrace				Service employees Service delivery process	Service interface	Skill Service quality	Service interface Social environment	
10	Execute				Service employees Service delivery process	Service interface	Service quality	Service interface Social environment	
11	Exit				Service employees Service delivery process	Service interface	Satisfaction	Service interface Social environment	
12	Enhance & expand					Post- customer experience (t+1)			

Source: Adapted from Baker *et al.* (2002:121); Bitner (1992:60); Ding *et al.* (2010:103); Fatma (2014:38); Sheng *et al.* (2016:4); Verhoef *et al.* (2009:32); Vos and Zomerdiijk (2007:105); Zeithaml (1988:4).

The challenge to retail management is to design and implement cues for each of the 12E sequential constructs to facilitate an improved level of customer experience. By implementing the cues, the 12E continuum is transformed into a customer-centric experience management framework. This framework requires retail management's active pursuit of closing customer expectation gaps towards higher customer experience levels.

The design and implementation of cues application of the dramatic, storytelling and rituals in Marketing, particularly customer-centric experience designs, suggest that each functional step in the conceptual management framework provides an opportunity to create distinctive customer experiences and memories (Lim & Kim 2018:145).

5.7.4 Dramatic art, storytelling, and market rituals

In the "Experience Economy", as described by Pine and Gilmore (1999:97-105), experiences are defined as events (Schmitt *et al.*, 2010:87). The researchers postulate that "an experience occurs when an organisation intentionally uses services as the stage, and goods as props, to engage individual customers in a way that creates a memorable event" (Pine & Gilmore, 1999:98). It implies that retail managers function as dramatic theatre producers staging events in retail stores through the application of a variety of dramatic art formats (Pine & Gilmore, 1999:97; Schmitt *et al.*, 2010:87;).

Zomerdijk and Voss (2010:69) acknowledge the use of dramatic art formats and suggest that the sequence, progression, and duration of events normally associated with visual, literary, and performing arts can be applied in experience-centric service designs to create and stimulate emotional effects during customer interactions.

The proposed retail experience management framework incorporates the role of the dramatic art and displays the retail shopping process as an event where the experience shopping journey reflects three phases: a beginning (pre-purchase), middle (purchase) and an end (post-purchase) associated with the dramatic arts (Atasoy & Martens, 2016:191; Lim & Kim, 2018:145). Not only do the three main phases of the dramatic, as identified by Lim and Kim (2018:145), resemble the retail shopping interaction process, but the 12E constructs associated with a retail shopping experience process also bear a resemblance to the elements associated with the dramatic art process (Chapter 4).

The proposed 12E experience continuum resembles a shopping "story" emerging from a customer's interaction with the retail store, crafted by incorporating dramaturgical techniques in the sequential customer journey design (Atasoy & Martens, 2016:195). In this context 12Es, the

customer journey represents a customer's story where the journey's different phases (12Es) are designed to create, facilitate, and mediate a story of a total customer experience (Atasoy & Martens, 2011:91).

The story, comparable to an experience, consists of retail people, places, and objects that can shape emotions of pleasure, satisfaction, and meaningful experiences (Atasoy & Martens, 2016:189). The operationalisation of selected 12E constructs through storytelling techniques and tools creates opportunities for retail staff to support customer experience creation through communication (Batat 2019:163; Peng, 2017:316).

Each functional construct in the proposed experience continuum provides an opportunity to create distinctive experiences and memories for customers (Lim & Kim 2018:145). The 12Es propose representing a retail store storyline, enabling retail management and staff to emphasise one or more narrative elements depending on the store's retail experience creation objectives (Batat, 2019:164).

The 12E continuum, embodied in a customer journey, with its sequence of pragmatic service process phases, elements, functional steps, encounters, events, actions, and activities, is presented as a retail shopping ritual (Otnes *et al.*, 2012:368; Rook, 1984:279). Rituals can potentially convert a customer from a spectator into a participant and eventually a consumer (Sherry, 1988:543). Rituals are a formal, scripted system of "symbolic, performative and often a repeated activity that providers execute for and with customers, to enhance customer experiences and achieve marketing goals" (Otnes *et al.*, 2012:368).

Rituals consist of behavioural episodes (12 E's), performed with formality, seriousness, and inner intensity (Rook, 1985:252), composed of four elements, "actor-participants, an audience, scripted episodic behaviour, and ritual artefacts", all elements characteristic of a retail store environment (Rook, 1984:279).

This study's proposed experience continuum includes salient elements of dramatic art, market rituals and storytelling features. Table 5-3 summarises the behavioural aspects of the dramatic market rituals and a conceptual model of customer experience compared to the behavioural elements included in the proposed customer experience journey.

Table 5-3: Dramaturgical, market ritual and customer experience behavioural elements as leading indicators to conceptual management framework

Dramatic (Lim & Kim, 2018:147)		Market rituals (Otnes <i>et al.</i> , 2012:368)			Customer experience (Lemon & Verhoef, 2016:77)		Conceptual management framework (12Es)	
Stages	Behaviour	Stages	Metaphor	Behaviour	Stages	Behaviour	Stages	Behaviour
Beginning	• Define • Plan • Reserve • Join	Ludic stage	Transporter	Greeting	Pre-purchase	• Needs recognition • Consider • Search	Pre-purchase	• Expect • Excite • Enter • Expose
Progress	• Explore • Participate • Prepare	Interaction	Persuader	Edifying	Purchase	• Choice • Ordering • Payment	Purchase	• Explore • Experience • Engage • Exchange • Embrace • Execute
Climax	• Absorbed • Immersion • Execute • Perform	Marketplace rituals	Performer	Inciting				
Maintenance	• Monitor • Change • Update	Transaction	Transactor	• Gift giving • Celebrate				
Ending	• Conclude • Leave • Finish			Parting				
					Post-purchase	• Consumption • Usage • Engagement • Service request	Post-purchase	• Exit • Enhance

Source: Adapted from Lemon & Verhoef (2016:77); Lim & Kim (2018:147); Otnes *et al.* (2012:368).

5.7.5 Human needs that motivate action.

The customer-centric experience management framework is proposed as a retail management tool for retail management who aspire to satisfy the needs of customers journeying through a retail store to provide an experiential shopping experience. The aim is to consider the person, as opposed to a customer, and through each of the 12E constructs, aspire to provide a holistic shopping experience at every level of the shopping process and every interaction (Gentile *et al.*, 2007:396).

Retail customers display fundamental psychological needs (Sheldon *et al.*, 2001:365), which should be accounted for in developing customer experience retail strategies. The proposed experience journey continuum, acknowledging that customers strive for certain fundamental qualities of experience (Sheldon *et al.*, 2001:327), formulates the first and last E-construct as “Expect” (customer expectations), which emphasises the identification of customer needs.

Identifying customer needs applicable to each of the 12E constructs of the in-store retail shopping process is important to an overall customer experience. Customer needs form the drivers for specific retail experience-related psychological interventions or actions (Hassenzahl *et al.*, 2010:358) at each of the 12E encounters. The interventions aim to influence and enhance customers’ “personal thriving” (Sheldon *et al.*, 2001:325).

Research conducted by Hassenzahl *et al.* (2010:353) shows a positive correlation between customer needs fulfilment and positive affect. It should thus be beneficial for retailers to proactively design, implement, and redesign cues functioning as psychological interventions for each of the 12E constructs. The experience-inspired cues should be developed in such a manner as to evoke sensorial, perceptual, cognitive, and affective experiences that can lead towards retail customer needs fulfilled through an experience (Hassenzahl *et al.*, 2010:361).

The challenge in 12E cue development is to establish the experiential content and characteristics of what qualifies as psychological needs (Sheldon *et al.*, 2001:337). In this regard, Gaggioli (2016:97) and Grant (1999:400) refer to Abraham Maslow’s hierarchical needs theory, where human needs are in ascending order of significance, culminating into a level of self-actualisation and self-transcendence. Research conducted by Sheldon *et al.* (2001:328, 329) also highlighted self-actualisation as part of a concise list of ten (10) of the most common psychological needs.

The top-ten most common psychological needs, as described by Sheldon *et al.* (2001:329), that should be considered in the design of retail store cues, are self-esteem, autonomy, competence,

relatedness, pleasure-stimulation, physical thriving, self-actualization-meaning, security, popularity-influence, money-luxury. In applying the Maslow hierarchical approach, Hassenzahl *et al.*'s (2010:337) research has shown the following three (3) levels of need-importance:

- Top important needs: autonomy, relatedness, competence, self-esteem
- Lower importance: security, self-actualization-meaning, physical thriving
- Little importance: popularity-influence and money-luxury

The top-ten psychological needs are not always present or equally intense in every of the 12E constructs. They are important to customers and serve as a broad categorical human motivation framework for developing and implementing interactive retail store tactics at every level of the proposed experience continuum (Hassenzahl *et al.*, 2010:46-49).

The objective of the 12E approach is not only to create motivational encounters but to create value for customers by enabling them “to live all the moments of the relationship with an organisation excellently, even beyond expectations” (Gentile *et al.*, 2007:396). The moments of the relationship, whether indirect or during direct interfaces with retail staff, are contained in each of the 12E constructs of the customer experience continuum.

The following section unpacks each of the 12E constructs around which retail scholars and practitioners can develop specific tactics for implementation. The 12E constructs form the subject of the quantitative and qualitative research phases.

5.8 CONTINUUM OF DISTINCT 12E RETAIL STORE CONSTRUCTS.

The experience continuum, encapsulated in a retail store customer journey, posing as an experience management framework, proposes to represent a renewed way to consider customer experience in retail stores. It includes tangible and intangible constructs appealing to customer's *emotional*, cognitive, behavioural, sensorial, spiritual, physical, and social values (De Keyser *et al.*, 2015:23; Meyer & Schwager, 2007:118). It builds on all customer senses, customer-retail interaction cycle, and services cape methodologies.

Atasoy and Martens (in Markopoulos *et al.*, 2016:183) associate designing-for-experiences as a process of designing for the state of change. It is an exploratory process (Atasoy & Martens, 2016:181), emphasising designing verbs, not nouns. The experience continuum's 12Es represent behaviour-changing verbs that require retail management to apply “different principles, knowledge, skill set and tools” (Markopoulos *et al.*, 2016:183).

Retail management is required to be creative in design as services are “multi-dimensional construct consisting of decision, access, transaction, benefit, and post-benefit conveniences, which reflect customers’ perceived time and effort expenditure in making purchase decisions” (Keh & Pang, 2010:57). In linking the multidimensionality of the construct with customer’s biasedness towards a sequence of events that show a positive development (Verhoef *et al.*, 2004:55) it stands to reason that Voorhees *et al.* (2017: 270) pleaded for a “framework that focuses on the integration of the pre-core, core and post-core service encounters”.

Batat (2019:66) proposes that it “is important for companies to advance a better and more comprehension of the characteristics of customer journeys, its stages, and its impact on the whole customer experience. From the experiential viewpoint, consumption experience is neither seen as being limited to prepurchase activities, nor to post-purchase ones, but it comprises a succession of other actions, which affect customers’ decisions and future activities”.

The continuum displays phenomenological, process-based, and outcome-based characteristics associated with the concept of service experience, as highlighted by Helkkula (2011:370) and enables retail management to devise manageable context, cues, and artefacts linked to each construct (Gentile *et al.*, 2017:396). Presenting the retail store customer journey as a continuum of interfacing and engaging customer/retail store activities, the seven key roles of customer journeys, as identified by Tax *et al.* (2013:456), can be facilitated and supported. Devising the appropriate context, cues, and artefacts applicable to each of the 12E constructs can collectively and individually facilitate and support the roles of guide, teacher, coach, personal assistant, expert, financial advisor, and consumer advocate.

The experience management framework consisting of the continuum of 12E constructs thus calls for retail management to develop, test, implement and manage a series of specific customer experience cues and artefacts that facilitate interactions and engagements between customers and retail store staff. Guiding the development of cues and artefacts should be customer needs and expectations that motivate customer behaviour. Baker *et al.* (2002:121) and Berry *et al.* (2005:52) refer to an acute awareness of customers’ emotional and functional needs that stimulate customer multi-senses towards in-store patronage).

The experience continuum’s first and last construct, being a continuous sequence, is “Expect” referring primarily to a retail customer’s needs and expectations of a shopping experience and secondary, it refers to the retail institution’s strategic business expectations.

5.8.1 Expect (expectations)

Customer expectations, especially those linked to extraordinary experiences, tend to be vague as it relate to “beliefs, evaluative criteria, attitudes and activity sequences” (Arnould & Price, 1993:25). The reason for this vagueness lies in that customers require specific emotional outcomes but do not necessarily know what consumption alternatives produce such emotions (Arnould & Price, 1993:25). This should however not discourage retail management but underlines the importance for actively closing the customer expectation gap.

Meyer and Schwager (2007:119) postulate that the root cause of the perceived gap lies in companies' obliviousness to and not fully understanding their target markets' experience needs, requirements, and expectations. Companies are, therefore, unable to comprehensively deliver on sought-after customer experiences, which negatively impacts a sustainable emotional connection between customer and company. Goldstein *et al.* (2002:124) ascribe the gap problem to the absence of detailed knowledge of customer needs, resulting in service packages and encounters that do not match customer expectations.

It is incumbent on retail entities to embark on customer research, observations, or consultations to obtain a comprehensive understanding of their target market's needs and expectations (Malins & Maciver, 2016:339). It is essential before any effort is made to plan, design, organise or implement any intervention on customer acquisition, engagement, experience, retention, loyalty, or growth (Kotler, 1988:173).

A customer needs analysis refutes the critique that a customer experience theory is oblivious to customer needs. Likewise, the range of interactions with customers during the customers' experience and when applying key retail elements, clearly shows that customers' needs are associated with customer interactions experiences (Otnes *et al.*, 2012:368). Norton and Pine II (2013:12) argue for the “rigorously developing” of knowledge and a deep understanding of customers' needs and expectations. This deep understanding is essential to operationalising and aligning each of the 12E constructs to customer experience objectives.

Gulati and Oldroyd (2005:97) reason that the answer to the primary organisational objective of understanding a customer can be found in a four-stage process. It is postulated that the following process is universal in nature and can also be applied to an in-store retail environment:

- **First stage** - The collation, standardisation, and organisation of all customer interaction and other relevant customer information drawn from retail stores into a single repository with the customer as the fundamental unit of analysis.

- **Second stage** -The analysis of collated customer information by business analyst experts drawing inferences to gain insights into customer needs, expectations and behaviour, which can be disseminated to applicable retail shopping stages and in-store areas for application and implementation.
- **Third stage** - Coordinating customer information to understand likely future customer behaviour. It suggests a dynamic symbiotic coordination where information and decisions are circulated back and forth between the different stages associated with the retail shopping process. It resembles a process of experimentation where customer behaviour is anticipated. Various interventions are evaluated, tried, and measured and feedback from retail staff is obtained to effect changes to customer interventions where required.
- **Fourth stage** – The learnings from the preceding three stages are brought together and applied to day-to-day retail operations. It represents a real-time response to customer needs, including the alignment of training programmes, informal values, and daily behaviour of retail store staff to satisfy customer needs.
- The four-stage approach is a pragmatic and practical tool to identify, confirm and execute customer needs through the “Expect”- construct. This construct aims to provide a detailed description of what customers expect to receive to satisfy their needs, also, how the retail service provider intends to deliver the required service through each of the 12E constructs and an alignment of the actual service delivered (Goldstein *et al.*, 2002:123, 131).

5.8.2 Excite

Customer excitement should be triggered and stimulated in the pre-purchase stage of the retail shopping process (Voorhees *et al.*, 2017:270). In this regard, Dunn and Davis (2003:35) refer to the pre-purchase experience touchpoints that a potential customer encounters before a decision to interact with a retail business or store.

Retail touchpoints function as cues or stimulus units (Becker & Jaakkola, 2020:639), attracting prospecting customers and influencing customer experiences. Jain *et al.* (2017:649) refer to the need for orchestration of a series of integrated cues that “collectively create a deep-seated preference for a particular experience”. This need arises from invoking an emotion (excitement) with customers residing in perceptions of the physical shop environment, which is an antecedent to behavioural responses (Wakefield & Baker, 1998:516).

Retail management should be attentive when they use customer expectations as a directional basis to influence prepurchase cues to create customer excitement and motivate them to interact. Brand-related cues such as brand design and identity, advertisements, brochures, Web sites (marketing communication), retail store location and atmospherics (Brakus *et al.*, 2009:53), anything that can be perceived or sensed by the customer (Becker & Jaakkola, 2020:639) in the pre-purchase stages, can create excitement. Lim and Kim (2018:143) suggest that the key should be to enable customers to visualise the visible and invisible areas of a specific type of service, the essential aspects of the service and the service delivery process.

Integrated cues enacting as excitement factors at the prepurchase stage should be of such nature, not expected by customers. It should imply products and service attributes that pleasantly surprise and generate delight, differentiating the retail entity from its competitors (Fuller & Matzlet, 2008:116,117). It should shape customer perceptions and expectations, increase brand awareness, and showcase benefits over competitors in potentially satisfying customers' needs and wants (Dunn & Davis, 2003:35).

The objective of excitement cues is to seize a customer's attention and to incite curiosity (Siebert *et al.*, 2020:49). Marketing communication often includes emotional evocative cues (Hill *et al.*, 2016:1029), inciting customer curiosity, enabling retailers to connect with customers in ways that can influence customer behaviour (Hill *et al.*, 2016:1028).

Tactics associated with pre-purchase marketing communication, such as advertisements, deliberately withhold information to evoke customer curiosity and create a temporary motivational state (Hill *et al.*, 2016:1029). This tactic establishes an early psychological connection with a customer, resulting into action to satisfy the curiosity (Hill *et al.*, 2016:1029) and a desire to engage (Hapsari *et al.*, 2017:21, 34) with the retail entity by entering a store.

Store entry decisions can result from pre-purchase marketing tactics but are more effective if coupled with supporting store window displays that further influence consumer perceptions of store/brand images (Oh & Petrie, 2012:27). Lange *et al.* (2016:1016) maintain that creative store windows can affect beliefs about retail offerings in the same way that retail advertising creativity affects perceptions of offerings featured in marketing communication. It can influence "consumers' perceptions of store and brand image and, ultimately, their decisions about whether to enter a store" (Lange *et al.*, 2016:1014).

The application of social media in creating excitement should be embraced as it impacts customer behavioural intentions and experience (Su, 2011:425). Retail tactics to instil and promote further excitement among customers can also revolve around the design of service

elements (Patri'cio *et al.*, 2018:3), interactions (Patri'cio *et al.*, 2008:320) and engagements (Lieberman, 2021:219) into human-centred retail customer touchpoints.

Lange *et al.* (2016:1014) emphasize the importance of store windows to excite customers and suggest that converting consumers into shoppers can commence at the retail store window level. This should extend into retail stores with a focus on “hedonic aspects of the in-store experience, such as the affective response of excitement.

5.8.3 Enter

The enter phase of the customer journey is the commencement of the phase that Voorhees *et al.* (2017:270) refer to as a pre-core service encounter. Voorhees *et al.* (2017:270) defines the pre-core service encounter period as “the time interval preceding the core service encounter that focuses on leading customers to engage with the firm in the core-service encounter”. The researchers posit that “the pre-core encounter occurs when customers either begin reviewing information about a firm's offering or make initial contact with the firm. Instances of pre-core encounters include seeking information from online reviews, addressing initial and exploratory questions to frontline employees, and onboarding processes” (Voorhees *et al.*, 2017:271).

Keh and Pang (2010:59) accentuate the importance of the entering phase by stating that “nothing will happen until customers get in touch with the service provider”. The emphasis should be on access convenience (Berry *et al.*, 2002:1). Siebert *et al.* (2020:49) agree with the importance of access convenience and stress that the service design in the initial service design cycle should provide for a “rapid entry”. The principle of this type of entry lies at “the beginning of sticky journeys” where retailers “attempt to eliminate customer decision-making by giving customers immediate access to the service. Accordingly, the most appropriate firm action at this juncture is to give potential customers a taste of the excitement to come as soon as their curiosity is sparked” (Siebert *et al.*, 2020:49). Retailers should thus focus on speedy onboarding techniques through the offering of exciting service experiences (Siebert *et al.*, 2020:50).

Emotion contagion plays an important role throughout the shopping journey, but it is crucial at the first point of contact with a customer entering a retail store (Otterbring, 2017:288). Pugh (2001:1018, 1026) refers to “service with a smile” and suggests that the use of emotion in organisations “is a potent tool not only because customers expect it to be a part of service, but also because displayed emotion can alter customer moods and thus influence customer attitudes toward an organisation”.

Otterbring (2017:288) and Hennig-Thurau *et al.* (2006:71) agree that the point at which a smiling employee greets and welcomes a customer should go hand in hand with appropriate eye contact from employees. In assessing retail store entry tactics, such as the levels of emotion contagion, retailers should also be cautious of anything that customers perceive as entry barriers (Voorhees *et al.*, 2017:279).

Pre-purchase marketing communication excitement cues extended into and supported by retail store window displays have the potential to generate a positive shopping motivational state with customers. Designed and developed in such a way as to grab the attention of customers, shape customer perceptions and expectations and create curiosity it can lead to customers being more inclined to visit a retail store (Fuller & Matzlet, 2008:116).

Entering a retail store introduces the store context to the customer. Zomerdijs & Voss (2010:68) surmise that store content comprises the physical setting, the social actors, and any social interactions with other customers and service facilitators in the store experience environment. Oh and Petrie (2012:28) and Spence *et al.* (2014:483) maintain that store atmospherics and relational elements within the store can influence retail store customers' conscious and subconscious perceptions and emotions and their shopping behaviours. It is because of the demonstrated effect of customer emotions on shopping behaviours (Kim *et al.*, 2016:5810) that these aspects should form the basis for retail store experience designs.

Research by Baker *et al.* (2002:120) on the extent to which environmental cues influence consumers' assessments of a store on various store choice criteria provides insights into the factors that can influence retail store customers when entering a store. The research focussed on the influence of staff, store design, and store ambience on store choice criteria such as perceived interpersonal service quality, merchandise quality, price, time/effort cost, and perceived psychic costs. It accentuates the importance of the identified store choice criteria and its influence on customers' patronage intentions, providing valuable insights to retail management regarding store-entering experiences. Retail management should consider elements associated with a low-stress, low-irritation shopping environment supported by customer-friendly store merchandising, a quality service consciousness, and an optimum cost/benefit awareness as it impacts retailers striving to attract new customers (Baker *et al.*, 2002:138, 139).

Customer needs, wants and expectations on the store entry process should provide insights into what customers consider important for creating a conducive shopping experience. As identified by Spence *et al.* (2014:483), store atmospherics and relational elements are important but

should be made practical through tactics that include formal welcomes, no wait in queues and first touch.

Though Otterbring *et al.* (2013:826), suggest that store greeters may positively impact consumers' emotions, Hyllegard *et al.* (2016:6) state that limited empirical research exist on the efficacy of store greeters and their influence on consumers' emotional states, and findings do, however, indicate that the presence of a store greeter can have a positive effect on consumers' spending, satisfaction, and perceptions of employees.

5.8.4 Expose

What customers had been exposed to through pre-purchase marketing communication and store window displays should be extended into the retail store. Lemon & Verhoef (2016:82) refer to multiple touch points to which customers are exposed, guiding them through the customer journey, directly and indirectly impacting their purchase behaviour. Exposing customers to the retail in-store does not imply non-availability of sales staff. Rapp *et al.* (2015:359) stress the importance of the constant availability of sales staff to be prepared to interact with customers at any time.

Research by Demoulin and Willems (2019:303) shows that the lack of available, friendly, and competent staff is one of the most irritating environmental factors in the retail purchase process. Their research established that a dominant driver of customer irritation relates to customers' negative perceptions of sales staff involved in the sales interaction process. However, on the positive side, polite, available, customer-focused staff trained to identify customer emotions accurately enhance customers' retail shopping experiences. In this context, retail management needs to communicate their expectations to sales staff and create a supportive, conducive environment through skills training, provision of resources and management support to realise and deliver on stated expectations (Wilder *et al.*, 2014:447).

In enhancing a shopping experience, retailers should also focus on exposing customers to deliberately designed shopping spaces that increase the probability of purchasing (Kotler, 1973:50). The researcher maintains that the store and the atmosphere in the store are more influential than the merchandise in the store (Kotler 1973:48). Merchandising, however, also play an important role in customer experiences with Cant and Hefer (2013:1493) suggesting that its prominence should consider the individual needs of customers as "perfectly designed visual merchandising displays are themes that affect the consumers' perception of the store".

On entering a retail store, customers should comprehensively be exposed to the store's visual merchandising, interacting with store atmospherics, and offering multiple choices to customers (Basu *et al.*, 2022:403; Cant & Hefer, 2013:1489). Visual merchandising should include product displays supported by visual (colour, light, props) and non-visual (sound, smell) elements (Park *et al.*, 2015:88). It should interact with retail focussed store atmospherics such as the store interior, store layout and human variables (Basu *et al.*, 2022:405) promising and enabling a seamless (Gummesson, 1995:250), conducive and customer friendly shopping experience.

The suggested interaction between visual merchandising and retail store atmospherics emphasises the necessity and importance of "synergistic product-cum-retail strategies" (Basu *et al.*, 2022:403). Retail management should translate these strategies into tactical in-store cues, exposing customers to a shopping environment that offers choice and promotes sensory experience-based selling (Parker, 2003:361). It entails visual merchandising through a "strategic display of merchandise to encourage retail sales through store design and product display (Park *et al.*, 2015:87). It also implies another key factor in customer exposure: in-store signage. Customer exposure to signage cues not only influences in-store navigation (also applicable to the exploration stage of the customer journey) but also has a secondary impact on the decision-making stages of an in-store search process (Otterbring *et al.*, 2014:667).

Skandrani *et al.* (2011:61) acknowledge the importance of store design and product display but also consider product assortment, crowding and music application as important aspects that can influence customer exposure experiences. The visualisation of essential aspects of the customer experience process should consider the service scape structure, the presence of other customers, and the dramatic structure of shopping events (Lim & Kim 2018:143).

Spence *et al.* (2014:483) contend that customers engage with sensory marketing and an experience economy. Thus, retail management must focus on engaging multiple customer senses during the store exposure while keeping the various atmospheric cues congruent to the functional benefits. The researchers accentuate the application of visual, auditory, olfactory, and tactile atmospheric cues as they impact retail customers' perceptions, emotions, and shopping behaviours. Verhoef (2009:33) supports the exposure to atmospheric cues and specifically highlights the key role that the service interface, assortment, price, and promotions can play in creating favourable shopping experience exposures.

Retail management should not underestimate the importance of a second good impression (following the physical entrance phase of the store) at the customer exposure phase of the customer journey. A study by Ieva and Ziliani (2018:316.317) emphasises the importance of touchpoint exposure (in his case, the retail store interior) as it correlates to customer loyalty

intentions, including relationship commitments, self-disclosure, and positive word-of-mouth. The in-store exposure phase of the customer journey forms part of what Akaka (2015:207) refers to as the experiential aspect of value created within the dynamic context of the retail store.

This study proposed that retail management regards the exposure phase of the customer journey as one of the “moments that matter” (Verhoef *et al.*, 2009:33). This phase opens the proverbial retail door to downstream customer journey influences on customer shopping behaviour (Verhoef *et al.*, 2009:33) and can motivate customers to higher levels of loyalty (Siebert *et al.*, 2020:60). It is for this reason that Lemon and Verhoef (2016:85) call for the recognition of the contribution that various touchpoints along the customer journey can exert on customer experiences.

Retail entities should confirm the role that the exposure phase of the customer journey plays in customers’ expected store experiences and individual goal setting as it influences their shopping behaviour (Puccinelli *et al.*, 2009:16). It should also establish and confirm what engages customers cognitively and emotionally during the exposure phase which promotes higher levels of preference and loyalty (Berry *et al.*, 2006:55).

Once these engagement motivators were established, retail management should develop and implement clues for visual detection by customers during the phase of the customer journey that collectively meet or exceed customer emotional and expectational needs (Khalid & Helander, 2006:204) in addition to functional expectations (Pullman & Gross, 2004:554). The cues should promote customer interactions in successive customer journey phases to pave the way to change customer behaviour towards purchasing (Yuuki *et al.*, 2017:754).

Following customer exposure, the next phase in the customer journey is when customers physically explore the retail store and its contents. The exposure and explore constructs in the customer journey are similar and comprise the same in-store variables that focus on stimulating multiple customer senses.

5.8.5 Explore

Research conducted by Ieva and Ziliani, 2018:308 shows that “higher frequency of exposure to touchpoints might lead consumers to become familiar with encountering them”. It was found that “different patterns of exposure to touchpoints are correlated to loyalty intentions such as relationship commitment, self-disclosure and positive word-of-mouth” (Ieva & Ziliani, 2018:317).

Though stimulating customers commences early in the pre-purchase journey phases (excite, entry, expose), it must be seamlessly extended (Gummesson, 1995:250; Tsai, 2010:334) to the

store exploration phase. The key focus for retail management in this phase should be to navigate the customer through the retail store and assist the customer in the decision-making process by creating favourable shopping experience exposures (Otterbring *et al.*, 2014:677).

Lemon & Verhoef (2016:82) refer to multiple touch points to which customers are exposed during the customer journey. These touch points associated with customer exploration, directly and indirectly, impact customer motives, motivations, and emotions, eventually influencing purchase behaviour. Visual in-store merchandising encountered during customer exploration represents such a touchpoint. If structured and supported effectively, this touchpoint can play an important role in enabling effective customer exploration (Lim & Kim, 2018:149) of store content. Giacomini (2014:612) acknowledges the potential benefits it can play in the store exploration phase and suggests that it should incorporate interactive and sociological aspects and model customer interactions by considering their value perceptions, expectations, experiences, and the meanings they attach to retail offerings.

Since the exploration phase of the customer journey represents the first real physical encounter with the store, Bolton (2020:282) suggests that retail management acquire, apply, and demonstrate scholarly knowledge to design flexible and resilient retail elements. These elements should be designed and applied to “physically, perceptually, cognitively, and emotionally intuitive” experiences during retail store explorations (Giacomini, 2014:606).

The intensity and efficacy of the customer exploration phase are preceded and eventually determined by retail management’s choice of retail store window displays, merchandising, or artistically orientated (Oh & Petrie, 2012:27). The objective with merchandising displays in a high customer traffic scenario is “to sell merchandise quickly through a straightforward presentation of what merchandise a store sells” while artistic displays “focus on communicating the store’s image and often use implicit messages that shoppers have to interpret” (Oh & Petrie, 2012:27).

There is no ambiguity in merchandising displays’ straightforward messaging of retail offerings compared to the abstract messaging of artistic displays. The latter induce customer curiosity and more in-depth in-store exploration (Oh & Petrie, 2012:29). Retail management should accept that either window display strategy (merchandising or artistic) impacts the content and context of in-store visual merchandising, cue development and customer exploration tendencies.

Customer exploration tendencies tend to be guided by customer store visit motives (purchase, pleasure, recreational) (Bäckström, 2011:200; Dawson *et al.*, 1990:410; Oh & Petrie, 2012:29).

Customer motives (Bäckström, 2011:207; Gilboa & Vilnai-Yavetz, 2013:244; Tsai, 2010:327) also direct customer in-store behaviour and should be anticipated and considered in the development and implementation of the most appropriate retail store exploration elements and paths (Dawson *et al.*, 1990:409).

Retail management should also acknowledge that customers experience specific emotions when exposed to and explore in-store merchandise displays and promotions, which can affect preference and choice behaviours (Arnold & Reynolds, 2003:90; Dawson *et al.*, 1990:409). Management and retail staff should thus encourage customers to explore all servicescape elements as interactions with contextual store elements can influence experiences (Demoulin & Willems, 2019:295; Lim & Kim, 2018:145).

Research has shown that customer-centred visual merchandising assists customers in exploring and navigating the store smoothly without obstacles or problems and enjoying the experience (Patricio *et al.*, 2011:186, 191). Exploration paths should enable and promote customer interactions, engagements, exchanges, and purchases towards loyalty and re-patronage (Lieberman, 2021:222).

The exploration path should thus enable the perusal of a product arrangement consisting of product variety, an assortment of brands, quality and value offerings, competitive pricing, informative product descriptions, attractive product displays and an easy-to-navigate shopping area (Tsai, 2010:335). These elements can stimulate customer interest and motivate heightened in-store merchandise exploration (Cant & Hefer, 2012:1489). Supported by well-developed and strategically positioned in-store signage, it can aid in customer in-store navigation and decision-making (Otterbring *et al.*, 2014:667).

Retail tactics advancing exploration should encourage customers, through store atmospherics and aesthetics that include lighting, colour, displays and shop temperature, to browse, acquire new knowledge and physically experience store merchandise (Gilboa & Vilnai-Yavetz, 2013:246, 250). Tangible in-store physical surroundings encountered while browsing (exploring) directly influence the cognitive and affective responses from customers and affect re-patronage intentions and customers' "willingness to recommend" the retail store to others (Wakefield & Blodgett, 1999:52, 55).

The role visual merchandising plays in customer experience during exploration should not be underestimated. The subliminal nature influences cognitive and affective customer responses during the store exploration process and enables a conducive shopping environment by creating

customer interest and a desire to explore further store merchandise (Cant & Hefer, 2012:1494, 1495).

The customer's desire to explore further leads seamlessly to what Hadi and Valenzuela (2016:228) define as the compensatory relationship between vision (exploration) and haptic (physical experience). The experience phase in the retail store customer journey encourages customers to physically engage with the retail merchandise through demonstrating, touching, handling, trying, evaluating, and appraising the store offerings.

The explore phase concludes the pre-service encounter phase and enters a phase defined by Verhoef (2017:270,271) as a pre-core service encounter phase preceding the core service encounter that focuses on leading customers to engage with the firm in the core service encounter. Verhoef suggests that the "pre-core encounter takes place when customers either begin reviewing information about a firm's offering or make initial contact" through "exploratory questions to frontline employees and onboarding processes" (Verhoef 2017:271). Such actions can also include the physical experience of in-store merchandise through touch, feel, play or trialling.

5.8.6 Experience

In-store product experiences remain vital to shopping experiences (Kim *et al.*, 2021:2). A critical requirement in the customer experience philosophy is thus for retailers to engage all customer senses (Kranzbühler *et al.*, 2018:448; Nagasawa, 2015:36; Puntoni *et al.*, 2021:132; Schmitt, 1999:57; Verhoef, 2016:71). Having engaged retail customer primarily from a visual perspective in the excite, enter, expose, and explore journey phases, the customer-retail interaction process progresses to a more physical engagement level that comprises various cues (Meyer & Schwager, 2007:118; Patrício *et al.*, 2011:182).

Research has shown that when the human nervous system combines visual and haptic information about an object in the same location, it "yielded an improvement in perceptual precision that approached statistical optimality" that is more precise than with vision or haptics alone (Gephstein, 2005:1013,1021; Hadi & Valenzuela, 2016:228). This research illustrates the importance of exploring visual merchandising, which should coincide with retail servicescape designs promoting haptic opportunities to retail in-store customers. It implies developing and implementing haptic stimuli or cues (Gephstein, 2005:1013), enabling customers to touch, handle, try, evaluate, and appraise the visual merchandise and reap the benefits of buying products in physical retail stores.

For ease of reference, this study groups all retail in-store customer haptic activities under the construct 'experience' as a reference to physical engagement through touch, handle, try, evaluate, and appraise visual merchandise. Zhang *et al.* (2022:167, 168) refer to physical engagement, the experience phase of the proposed customer journey, as the phase after visual inspection (expose, explore) where customers obtain concrete, tangible multisensory knowledge and experiences of retail store merchandise.

Retail customers' in-store shopping motives, as identified in the exploration phase of the customer journey (Bäckström, 2011:200, 207; Dawson *et al.*, 1990:410; Gilboa & Vilnai-Yavetz, 2013:244; Oh & Petrie, 2012:29; Tsai, 2010:327), are also important mediators in customer in-store haptic behaviour. These motives are leading indicators of the type of haptic information retail customers want to extract from products. In this regard, Peck and Childers (2003:36, 39, 45) refer to instrumental and autotelic forms of information.

Instrumental information focuses on product structural properties, product performance and purchase, while sensory experience and hedonic appreciation of products. Peck and Johnson (2011:223) thus refer to two forms of touch: instrumental touch, where the purchase is imminent (to establish specific haptic product attributes) and hedonic touch (sensory experience for enjoyment) that might not necessarily result in a purchase.

A prerequisite for creating an encouraging and rewarding haptic customer experience is a comprehensive understanding of the target market's needs and expectations (Malins & Maciver, 2016:339). This knowledge enables retail management to distinguish between what constitutes haptic and non-haptic tactics and guide decisions on the application of visual cues and haptic or non-haptic product descriptions (written descriptions) (Peck & Childers, 2003:45). These are important decisions as Zhang *et al.* (2022:167) posit that physical engagement cues have the potential to enable favourable customer learning experience, increases re-patronage and develops more profitable customers.

The cues should encourage customers to visually inspect, physically touch and interact with store merchandise and ensure that supporting pictures and descriptions are adequately placed and formulated to receive the desired haptic experiences (Zhang *et al.*, 2022:168). Streicher and Estes (2015:350, 351) summarise, from several supportive studies, the value that lies in a haptic experience. The researchers refer to the cutaneous (dermal) and kinesthetics (muscle sense, sense of movement) nature of haptic experiences and state that it facilitates object recognition, increases merchandise's perceived value, enables brand differentiation, provides a competitive advantage, affects consumer perceptions, attitudes, and behaviours, and impacts customer purchase decisions.

Several researchers (Becker & Jaakkola 2020:639; Hadi & Valenzuela, 2016:229; Spence & Gallace, 2011:2690) note that customer's haptic experiences can be manipulated and influenced by the macro geometric and micro geometric cue properties of retail merchandise (shape, surface feel, packaging design) as it has an impact on the multisensory evaluation of merchandise. These research findings are supported by Peck and Johnson (2011:223), who refer to the positive customer attitudes and purchase intentions toward merchandise that displays softness in textures. Zhang *et al.* (2022:168) and Hadi and Valenzuela (2016:227) support the haptic benefit of merchandise valuation and include touch's positive role in customer persuasion and satisfaction.

Though Kim *et al.* (2021:1) agree with Zhang *et al.* (2022), their research also shows that, in addition to physical interactions, the activation of the customer's mental imagery is as important in customer decision-making. Mental imagery, evoked by the shopping process, can influence consumers' affective, cognitive, and behavioural responses and customer decision processing (Kim *et al.*, 2021:8).

Thus, retailers must develop and deploy cues that stimulate sensory perceptions and imagery. Kim *et al.* (2021:8) state that visual merchandising, product presentations, and displays can encourage sensory perceptions and mental creations of consumption images while conveying useful information to facilitate decision-making. Supplemented by walls, window displays, in-store digital screens, digital signages, touchscreen monitors, in-store mobile apps, augmented reality (AR), and virtual reality (VR) all have the potential to encourage shoppers to engage in consumption imagery during the shopping process (Kim *et al.*, 2021:9). Multi-interface systems such as self-service technologies in a retail in-store environment can also affect customer perceptions and behaviour (Lemon & Verhoef, 2016:83; Patrício *et al.*, 2008:319).

In promoting and encouraging the 'experience' phase of the proposed customer journey, retailers should consider the role of some elements in the retail display area as they can inhibit haptic and imagery experiences. For example, Peck and Childers (2003:35) suggest that a retail display case can function as a barrier and "decrease confidence in product evaluations and increase the frustration level of consumers who are more motivated to touch products".

In the same regard, Zhang *et al.* (2022:183) alert retailers to decisions of choice that can be decisive in creating haptic experiences. These include essential decisions about operating a retail store and showroom, full or limited assortment, full or limited staff, the role of private labels, the leveraging of technology to create physical engagement and the identification of haptic and no-haptic inclined customers.

Kim *et al.* (2021:9) emphasise the responsibility of retail staff to encourage haptic customer behaviours (touch and interaction with merchandise). The researchers suggest that the retail store service playbook comprises sales tactics, including customers' "gentle" encouragement to imagine consumption. Bäckström (2011:205) suggests allowing customers to scout as it will enable them to interact with the store merchandise.

Retailers enabling a natural migration from the entry, exposure, exploration, and experience journey phases, including the seamless merging of the visionary, haptic and imagery approaches, stand to benefit from an increased endowment resulting from psychological ownership brought about by varying levels of interface and touch (Brasel & Gips, 2014:227). Peck and Shu (2009:434) posit that encouraging imagery, or actual touch of retail merchandise by retail shoppers, can increase perceived ownership. The increased perceived ownership results in strong endowment effects, an increase in the valuation of merchandise (Peck & Shu, 2009:435,444) and ultimately an emotional attachment with the customer (Shu & Peck, 2011:439).

The strength of the emotional in-store attachment with the customer relies on the most advantageous inter-sensory integration of the compensatory relationship between visual and haptic cues that coincide within the retail shopping space (Gephstein *et al.*, 2005:1014,1021; Hadi & Valenzuela, 2016:228). In this regard, it was found that in a non-optimal integration, customers can experience an overload of visual stimulation due to crowded merchandise displays and thus must rely more on haptic behaviour to affect merchandise choice (Hadi & Valenzuela, 2016:228).

Haptic experiences, associated with the 'experience' phase of the proposed customer journey, have been found to increase affective customer responses, attitudes, and purchase intentions (Peck & Wiggins, 2006:70). These experiences revolve around the role and value of effective haptic cues aimed at initiating and activating customer interest with retail staff hovering at the background. The next step of the customer journey continuum requires retail staff to move from an observer and supervising role (customer shadowing) to a formal and active engagement with the customer.

5.8.7 Engage

As the customer's retail journey migrates through the pre-purchase and pre-core phases, it reaches the phase where more active retail staff interaction is required to guide customers in assessments of service quality and to assist in the purchase process (Hennig-Thurau *et al.*, 2006:58). This purchase process is characterised by in-store interactions associated with choice

and payment (Lemon & Verhoef, 2016:76). It follows from a predominantly passive persuasion (Peck & Wiggins, 2006:70) of the customer through the expose, explore, and experience phases of the customer journey to an active physical engagement with retail staff.

Zomerdijk & Voss (2010:68) state that services designed to engage customers is a key feature of an experience-centric service. Farah *et al.* (2019:140) agree with the statement and posit that customer engagement should be regarded as the most important phase of the customer journey. The engagement phase should thus be designed, structured, and executed to affect a distinct experience, resulting in a purchase that paves the way for sustained store patronage (Sherry, 1988:543).

In an extensive review of engagement research, Vivek *et al.* (2012:132) identify four categories of experience-centred engagement. The categories are structured in “two dimensions - interaction with offerings versus more general activities and initiation by customer versus provider” (Vivek *et al.*, 2012:132). From a literary review on engagement, Vivek *et al.* (2012:133) conclude that the customer or the retail organisation can initiate it. It typically results from a customer’s participation in and connection with store merchandise or any other in-store activity staged by the organisation. In considering the two dimensions of engagement foci, retail management can develop and deploy in-store engagement tactics to aid the development of relationships with current and potential customers (Vivek *et al.*, 2012:137).

Pine and Gilmore (1998:99) refer to customer engagement as inherently personal, where customers are engaged emotionally, cognitively, and spiritually. The impact of the engagement phase also influences customers’ behavioural, sensorial, and social responses (Lemon & Verhoef, 2016:74). Given the personal nature of the phase, it compels retail entities to provide for different levels of personalisation linked to the customer’s desire for individualised customization (Wilder *et al.*, 2014:446). Retailers should not underestimate the importance of the engagement phase, as Lemon and Verhoef (2016:73) declare that its impact stretches beyond a persuasion to purchase. It impacts customers’ after-purchase motivational state to co-create, use word of mouth to influence, and make referrals.

In the formulation of engagement tactics and the development and implementation of supporting cues, retail management should consider the following characteristics associated with the customer engagement phase of the customer journey:

- Customer engagement is a physical experience that is tangible, concrete, and multisensory and enables customers to obtain additional knowledge about retail offerings, translating physical engagement into customer value. (Zhang *et al.*, 2020:166).

- Customer learning obtained through retail staff engagement is closely related to the experiential learning theory associated with the philosophy of education, where the customer progresses through different sequential stages of experience, reflection, thinking, and acting (Kolb & Kolb, 2005:194).
- The retail customer engagement process has a high level of contagion that is most influential in the early stages of the engagement (Otterbring, 2017:288; Pugh, 2001:1018). Greeting customers, smiling, and eye contact are important elements of contagion (Hennig-Thurau *et al.*, 2006:71; Otterbring, 2017:288), and customer exposure to these positive gestures can affect a change in the customers' emotional state (Pugh, 2001:1020).
- The engagement phase can be defined as “emotional labour” (Hochschild, 1983:147), requiring face-to-face contact with the customer, influencing the emotional state of a customer and empowering retail staff to exercise a degree of control over the emotional attitude of customers. (Hochschild, 1983:147).
- The engagement phase is closely related to the second stage, “progress”, of the dramatic structure (Egri, 1960:280) that is associated with customer experience phases as described by Lim and Kim (2018:149,150). It is in the “progress” phase (engagement) where customers and retail staff “prepare items and information required to achieve the goal of service experience” in the retail selling process (Lim & Kim, 2018:147).
- The symbiosis between the dramatic structure and customer experience compels retail staff to demonstrate certain levels of acting. Hennig-Thurau *et al.* (2006:68) distinguishes between staff engaged in deep, authentic acting and those that embark on surface acting. The former enables favourable emotional reactions from customers, while inauthentic staff, which demonstrates surface acting, leads to disinterested customers.

In considering the engagement characteristics, retail management should develop tactics to ensure connections with meaning, accomplishment (pursuing and mastering) and positive emotions (Batat, 2019:162; Neuhofer *et al.*, 2010:2884; Otnes *et al.*, 2012:377). These tactics should comprise the following approaches:

- In utilising customer intelligence from the expectation phase, retail management should communicate to retail staff customers' engagement expectations and what management expects from retail staff to support customers (Wilder *et al.*, 2014:447).

- Providing a conducive retail and sales environment and climate with supportive merchandising, facilitating physical customer engagement and empowering retail staff to assist and guide customers through the engagement phase is a non-negotiable (Wilder *et al.*, 2014:447; Zhang *et al.*, 2020:182).
- Retail staff should be empowered (skilled) to engage in adaptive behaviour by discerning what behavioural styles are appropriate for customer interactions (Pugh, 2001:1019). Retail staff should possess appropriate skills and adequate resources and receive sufficient support to demonstrate adaptive engagement behaviour and deliver adaptive sales offerings (Wilder *et al.*, 2014:446).
- Retail staff should exhibit the ability and skills to empathise, anticipate, and be creative (Wilder *et al.*, 2014:448). The focus should be on the “identification of opportunities for adaption (empathy and anticipation) and determination of how to alter the service (creativity)” for an adaptive retail experience to occur (Wilder *et al.*, 2014:447).
- Retail training should also enable staff to recognise, understand, and have empathy for customers' feelings, motives, and concerns and recognise customer behaviours to adapt customer engagements to positively impact customer experience (Wilder *et al.*, 2014:447). This includes recognising customers' verbal and nonverbal cues to anticipate needs (Wilder *et al.*, 2014:445). Retail staff should be able to put themselves in the customer's shoes (Batat, 2019:168).
- In recognition of the dramatic structure associated with customer experience, particularly the engagement phase of the customer journey, Hennig-Thurau *et al.*, (2006:70) highlights the need for retail staff training in, for example, perspective-taking techniques to enable engagement through deep acting staff behaviour.
- Using the engagement phase to facilitate transformative customer experiences, Neuhofer *et al.* (2010:2884) suggest focusing on customer happiness and fulfilment through creating positive emotions, engagement, relationships, meaning, and accomplishments.
- Application of ritual language during the engagement phase to assist customers in discussing their desires and more accurately diagnose their needs and wants (Otnes *et al.*, 2012:377).

- Applying initiative-taking personalisation and contextual interaction techniques (Edelman & Singer, 2015:92, 94) at engagement to analyse customer behaviour, tailor the engagement, and prepare the customer more effectively for the next phase (exchange) following the engagement.

The engagement phase of the customer journey, as proposed by the customer experience continuum, is a phase of more active retail staff interaction to identify the needs and wants of in-store retail customers (Otnes *et al.*, 2012:377). To gauge and assess the customer's multisensory levels, to guide customers in assessments of service quality (Hennig-Thurau *et al.*, 2006:58) and choice (Lemon & Verhoef, 2016:76).

The engagement phase also serves to encourage the development of a relationship with current and potential customers (Vivek *et al.*, 2012:137) and is the starting point for creating meaning and accomplishment in the customer's shopping process (Neuhofer *et al.*, 2010:2884). It seamlessly prepares the customer for a more in-depth exchange of information regarding merchandise and choice between a customer and supporting retail staff.

5.8.8 Exchange

The engagement phase of the customer journey prepares the path for a more in-depth interaction where the objective is to influence further the psychological process of the customer's purchase decision. The subsequent 'exchange' phase of the customer's retail journey is focused on creating an emotional attachment that results in a "willingness" or cheerful outlook towards the store's retail merchandise (Yuuki, 2017:762,754).

The journey's exchange phase implies what Edelman and Singer (2015:94) refer to as initiative-taking personalisation and contextual interaction between customer and sales staff to draw in and permanently capture customers. The 'exchange' phase provides back-and-forth repartee and communication to exchange information and establish a firm connection with the customer (Otnes *et al.*, 2012:369).

This study posits that the exchange process supports a reciprocal educational/learning process between customers and retail staff. Through exchanges, retail staff can obtain valuable information on the customer's needs and wants, their value assessment of the merchandise, their experience of service-scape elements, and their sensory experiences, which is - a verdict on the store's 9P's marketing-mix-customer-benefit package (Goldstein *et al.*, 2002:123). Reciprocally, customers can learn from retail staff feedback and advice on what suits them best and the optimal solution or solutions for complete satisfaction of current and future perceived

needs and wants. The exchange process embodies the pedagogic experiential theory of learning applied to a retail sales customer-staff relationship.

The experiential learning theory encourages “opposing modes of reflection and action and feeling and thinking” (Kolb & Kolb, 2005:194). The researchers maintain that conflict, differences and disagreements drive a learning and educational process (Kolb & Kolb, 2005:194). Applying the experiential learning principles through the exchange phase provides more personalised interactions and differentiation opportunities through open and resilient exchanges between customers and sales staff (Lieberman, 2021:220).

In this context, Edvardsson and Olsson (1996:142) refer to the need for trustful and open dialogue between retailer and customer to achieve an effective meeting of minds. Smith and Lewis (2011:392) suggest that these iterations of exchanges provide reciprocal beneficial learning opportunities, problem-solving creativity, flexibility and resilience advancement, and the release of internal retail human potential. Otnes *et al.* (2012:369) refer to the salesperson-customer interaction as a “voluntary dyadic interpersonal exchange” that should be regarded as one of the important foundation elements of retail customer experience.

However, the success of the exchange phase between the complementary roles of customer and retail staff depends on the participants' expectations, the communication thereof, and the understanding of each's roles, duties, obligations, and privileges (Wilder *et al.*, 2014:447). If clearly understood by participating parties, the back-and-forth nature of exchanges can result in rapport and responsiveness, leading to a relationship that increases customer and sales staff satisfaction (Puccinelli *et al.*, 2009:24).

In considering the efficiency and effectiveness of retail in-store exchanges, retail management should consider:

- Tactics and cues promoting and supporting emotional bonding between customers and retail staff resulting in a “willingness” or cheerful outlook towards the store's retail offerings (Yuuki, 2017:762,754)
- The development and implementation of initiative-taking personalisation and contextual interaction capabilities aimed at permanently capturing customers by creating a “stickier” customer exchange experience (Edelman & Singer, 2015:92).
- Training retail staff on customer experiential exchange communication tactics (Otnes *et al.*, 2012:369) and communication styles can influence customer sensory experiences (Puccinelli *et al.*, 2009:25).

- Empowering retail sales staff to recognise and read customers' nonverbal cues to respond more effectively to customer needs, wants and expectations (Puccinelli *et al.*, 2009:24).
- Training sales staff to identify and empathise with customer needs and wants (emotional, physical, financial) enables creativity in adaptive retail offerings to exceed customer expectations (Wilder *et al.*, 2014:8).
- Service customization through staff adaptiveness by ensuring appropriate skills and providing sufficient resources and staff support to deliver adaptive sales offerings (Wilder *et al.*, 2014:446).
- Retail staff proficiently using marketplace ritual language usually facilitate the desired customer experience during the exchange process (Otnes *et al.*, 2012:367). The use of edifying rituals to educate customers on negative or risky aspects of marketplace experiences (Otnes *et al.*, 2012:375). The experience is enhanced by embedding marketing expertise into sales and service functions through coordinated recruiting, skill development, or rotational programs (Lieberman, 2021:222).

The success of a customer journey exchange phase relies exclusively on the retail staff's communication skills. The back-and-forth interactions with customers and the customer communication used during the exchange phase are regarded as "one of the most effective relationship-building strategies" that can positively contribute to key retail metrics such as engagement, satisfaction, retention, and net promoter score (Palmatier *et al.*, 2006:136).

The exchange process between sales staff and customers should be regarded as a process to model. Lockton *et al.* (2016:15) call these customers "thoughtful customers". Such customers learn from their own experiences but also from sales staff presenting them with educational product information (reduce uncertainty, increase decision confidence), reasoned arguments, motivating them to explore the implications and consequences of their shopping decisions, change their attitudes about products, are open to persuasion and even possibly change their behaviour accordingly (Lockton *et al.*, 2016:10,15).

This study suggests that direct customer interactional stages such as engagement and exchange are pivotal to modelling a thoughtful customer in the retail purchase process. The pre-purchase (excite, enter, expose) and exploratory pre-core (explore, experience) customer journey stages and, in particular, the interactional engagement and exchange stages will have

little positive effect on an in-store retail purchase if not concluded into an 'embrace' phase where a meeting of minds takes place between customer and sales staff (Yuuki *et al.*, 2017:754).

Voorhees *et al.* (2017:279) remind marketing scholars that "in terms of demand characteristics, key variables - such as the need for information, level of service literacy and the perceived risks associated with a service - are probably natural drivers explaining the relative levels of investments in the three encounter stages. Finally, it is important to evaluate the effects of different resource configurations on firm performance".

In this context, Voorhees *et al.* (2017:279) issue a call to action to researchers by stating that "historically, researchers have obsessed over the core service encounter, and decades of research have informed optimization efforts for those moments when the customer is "in the factory". While these investments have resulted in gains in service excellence, they have also resulted in a form of service myopia, with too much emphasis on the core service encounters and insufficient focus on the pre-core and post-core encounters. Specifically, by narrowly focusing on the core, researchers are missing opportunities to apply service theories and principles to the pre-, and post-core encounters, where best-in-class firms are already beginning to differentiate. Ultimately, without widening our lens, service research risks becoming less relevant in the future".

The next phase of the customer journey continuum, embracing the customer, acknowledges Voorhees *et al.* (2017) call to action through the inclusion of a phase promoting trustful and open dialogue between retailer and customer to achieve an effective meeting of minds where (Edvardsson & Olsson, 1996:142; Yuuki *et al.*, 2017:754).

5.8.9 Embrace

Constructing a retail customer journey continuum along the E-constructs aims to invoke positive experiences and attitudes that drive purchases and create a long-term relationship between customer and retail entity (Yuuki, 2017:754). This study posits that the effect of the aforementioned E-constructs is meaningless if it does not lead to an amicable meeting of reciprocal expectations between customers and retail sales staff. For this to happen, there must be a positive embrace – acknowledging and accepting each other's position (Wilder *et al.*, 2014:447).

The embrace stage of the customer journey can best be described through the analogy of an experience, as identified by Lim and Kim (2018:147), where a shopping action builds up to a climax, an emotional peak of customer immersion. At this point of emotional connection, the

expectational divide between customer and retailer (Goldstein *et al.*, 2002:124; Klimek *et al.*, 2017:2; Meyer & Schwager, 2007:119) can be bridged. An emotional connection can potentially be a sustainable benefit for both the customer and the retail entity (Prokesch, 1995:101).

Although Otterbring (2017:288) suggests that emotional contagion is most influential in the early stages of shopping, this study posits that the embrace phase represents the pinnacle of contagion in retail shopping. It facilitates the mediating roles of emotion and cognition on behaviour (Kim *et al.*, 2021:5) where the psychological constructs of anticipatory emotion (visualisation) and decision confidence drive customer behavioural intent to purchase (Kim *et al.*, 2021:2). It is during the process of embracement that the display of positive emotions (Otnes *et al.*, 2012:377) by sales staff can positively affect customer's sensory perceptions and mental imagery and influence customer decision making (Kim *et al.*, 2021:8; Pugh, 2001:1018).

Embodied cognition through the embodiment of emotion during the embracement process reinforced by the congruence of facial and bodily expressions and posture and language's emotional tone can facilitate comprehension of embracement communication (Niedenthal, 2007:1002). An embracement phase complemented by re-enactment, simulation, resonance, and emulation can lead to a level of empathy that is favourable in influencing and assisting the customer's transformation route towards the execution phase (purchase) of the customer journey (Batat, 2019:168; Niedenthal, 2007:1005).

In facilitating transformative experiences, Neuhofer *et al.* (2010:2883,2884) and Otnes *et al.* (2012:377) highlight the role of positive emotions, engagement, relationships, meaning and accomplishments. These are all dimensions that sales staff should consider, not only in the engagement phase but also in the embracement phase of the customer journey. In furthering the transformative process, the retail entity should acknowledge, make provisions, and embrace customers' diverse requirements and wishes to determine their value for themselves through co-created personalized experiences (Frow *et al.*, 2014:333).

The increase in perceived ownership experienced by the customer (Peck & Shu, 2009:435, 444) brought about by the haptic (experience) phase of the customer journey forms part of the customer transformation process characterised by an emotional attachment to the customer (Shu & Peck, 2011:439). This attachment strengthens as the customer migrates through the engagement and exchange phases, resulting in a "willingness" or cheerful outlook towards the store's retail merchandise (Yuuki, 2017:762, 754).

Yuuki (2017:765) reports that the customers' willingness stems from an emotional attachment that develops from a willingness to own (product becomes a part of self-identity) to a willingness

to purchase. It is at the embracement phase of the journey, supported by the salesperson-customer interaction (Otnes *et al.*, 2012:369), where each's position is acknowledged, refined, accepted, and finally embraced (Wilder *et al.*, 2014:447). At this phase, sales staff can again encourage sustainable consumption, followed by a sales execution phase (Yuuki, 2017:766).

5.8.10 Execute

Execution represents the pinnacle of any customer's retail journey and the victory any retailer aspires to, converting a customer from a "spectator to participant to consumer" (Sherry, 1988:543).

The customer's willingness to purchase, as described by Yuuki (2017:765), exemplifies the peak of the emotional attachment between sales staff and customers. It is reminiscent of the "climax" phase of Lim and Kim's (2018:147) experience design board. The execute phase signifies the customer's purchase actions resulting from what Siebert *et al.* (2020:51) described as the customer's migration from observed excitement to anticipated excitement to realised excitement.

The customer's migration process is primarily led and influenced by a customer's emotional attachment towards the purchase action (Yuuki 2017:763) that evolved from the pre-purchase and pre-core shopping phases. Voorhees *et al.* (2017:270) define the purchase action as the core service encounter period representing "the time interval during which the primary service offering is provided to the customer".

The execution process (physical purchase) embodies 'realised excitement' through an easy, trouble-free, and speedy exit process comparable to the "rapid entry" process (Siebert *et al.*, 2020:51). Customers, after a retail shopping process, have a low tolerance level for waiting in a line to effect payment for purchases (Larson *et al.*, 1991:44). Edelman and Singer (2015:92) support this notion and state that customers completing a multifaceted journey process prefer a quick and easy execution process. Hence, Khan *et al.* (2020:6) suggest that retailers consider using "self-checkout technology to scan customer bags and allow payments without queues, thus reducing customer wait times and improving their experience".

Customer expectations, perceptions, and experiences of waiting times can influence the overall retail experience. Verhoef *et al.* (2004:54) maintain that negative time preference in cases where the most preferred outcome (ownership through paying for merchandise) is served at the end of a sequence of events (customer journey) can negatively impact the overall retail experience as customers expect a "happy ending" (Verhoef *et al.*, 2004:56).

The retail execution phase of the customer journey (checkout) should focus on three operational dimensions, efficiency, assistance, and convenience, associated with the checkout process and the impact thereof on customer experience (Amorim *et al.*, 2016:1). Morimura and Nishioka (2016:242) state that most retail customers, while queuing for the checkout process, experience some level of boredom, irritation, frustration, or despair. The execution phase is transactional and does not require in-depth social/interpersonal contact between the cashier and the customer. Such contact might make the process ineffective and slow (Otnes *et al.*, 2012:369).

Customers require fast and reliable checkout facilities supported by process convenience, customer-friendly cashier staff and an ergonomically designed store layout (Amorim *et al.*, 2016:28,29). These checkout criteria not only apply to retail staff-assisted checkouts but also to self-service checkout options that might also be lower in cost, faster in processing and easier to operate (Amorim *et al.*, 2016:29)

Automation of the checkout process called for by Edelman and Singer (2015:92) is supported by a statement from Duarte *et al.* (2021:142) that self-checkout options are more effective and decrease customer waiting experiences. This is a possible solution to Wiechert *et al.* (2009:140) notion that many customers want to leave the retail store as soon as they acquire the required merchandise.

Customer waiting time at staffed checkout lines is “an exit-stage operation occurring between the point of selection and the point of sale; that is, it is the operational stage of transaction consummation” (Morimura & Nishioka, 2016:242). Customers tend to “overestimate the duration of this stage, and the influence of this final-stage encounter on satisfaction depends on how the wait is managed” (Morimura & Nishioka, 2016:242). Thus, managing customers’ perceptions of waiting in line is necessary and requires retail management to consider what Larson (1987:895, 903) defines as an understanding of the “psychology of queuing”.

Optimising the sales execution phase through effective exit-stage operations, whether staff-supported or automated and creating conducive checkout surroundings should be retail store objectives (Morimura & Nishioka, 2016:251). Retailers should proactively manage customers’ perceptions of waiting as this final stage of interaction can affect customer satisfaction and experience (Morimura & Nishioka, 2016:242). Training and educating staff on the impact waiting can have on customers, preparing staff to manage difficult customers, and designing operations to minimise waiting time are all tactics to be considered by retail management to facilitate a practical execution phase (Davies & Heineke, 1994:32).

Schögel and Lienhard (2020:889) state that the check-out process, synonymous with the sales execution phase of the customer journey, must be streamlined as it is this process the customer will remember most after the retail experience ends. Though the check-out process predominantly represents execution, the customer exiting the store after the conclusion of a purchase inextricably forms part of the post-execution process. These two phases, execution, and exit, represent the final in-store shopping events, defining moments of quality, repeat shopping intentions and loyalty (Hansen & Danaher, 1999:233). Zomerdijs and Voss (2010:69) support this notion and posit that the conclusion of a shopping experience is more influential on a customer's experience than the beginning.

5.8.11 Exit

The penultimate phase in the customer journey continuum is the customer exiting the store. The execution phase of the customer journey represents the core service encounter (Voorhees *et al.*, 2017:270) but is not the final stage of interaction between the in-store customer, as Morimura and Nishioka (2016:242) suggested. How the customer physically exits the retail store is important. Voorhees *et al.* (2017:278) believe that post-core encounters, such as the exit process, can potentially negatively affect the overall customer experience. Retail management should proactively identify and remove exit barriers (Voorhees *et al.*, 2017:279).

Keh and Pang's (2010:59) research on the importance of special separation can also be applied to customer journey phases and the impact it might have on not only access convenience but also exit convenience as it can influence post-experience evaluations (Keh & Pang, 2010:66). The exit phase should be an opportunity to create "a happy ending of a service experience" as suggested by Verhoef *et al.* (2004:56) peak-end rule which indicates that the last in-store retail event should be the most significant.

In discussing six emergent marketplace rituals, Otnes *et al.* (2012:371) identify "parting" as a significant step in retail. This step suggests that customers should be acknowledged when exiting a retail store and offered suggestions for future retail shopping activities.

Although Hennig-Thurau *et al.* (2006:71), Otterbring (2017:288) and Pugh (2001:1018) state that emotional contagion is most influential in the early stages of a service encounter, this study posits that it is as important in the closing stages of the customer's in-store journey. The customer exit phase should be complemented by retail staff making eye contact, smiling, and offering wishes to the customers leaving the retail store. These gestures of emotional contagion provide for a positive peak experience that will enhance satisfaction (Verhoef *et al.*, 2004:62; Voorhees *et al.*, 2017:279), create sustained store patronage (Sherry, 1988:543), and loyalty

intentions such as relationship commitment, self-disclosure, and positive word-of-mouth (Ieva & Ziliani, 2018:308).

Although the in-store retail experience continuum concludes with a post-purchase exit from the store, the overall customer experience does not end when the customer exits the store. Klaus *et al.* (2012:5) argue that post-purchase encounter experiences also impact customers emotionally, functionally, and socially, an argument supported by Homburg (2017:384).

The post-purchase process should be assessed for possible redesign and reengineering of the in-store customer experience continuum embodied in the in-store customer journey. Enhancements to the in-store customer journey should be implemented with due consideration of customer feedback on post-purchase interactions beyond the exit phase (Lemon & Verhoef, 2016:78).

5.8.12 Enhance

The final stage of the proposed customer experience continuum, before it starts afresh with another iteration, entails an evaluation of all the in-store pre-purchase, purchase, and post-purchase stages of the customer's experience (Lemon & Verhoef, 2016:78). This stage is not a direct feature of the customer journey but is an essential construct to provide valuable input towards improving journey experiences. Finally, a continuous feedback loop is non-negotiable for companies to keep up with how quickly humans and their needs change daily and even from moment to moment (Standish *et al.*, 2023:24).

Retail entities must conduct in-depth analyses and evaluations of the customer journey from a customer's and a retail company's perspective. The objective should be to identify the performance on key parameters and at key trigger points of each journey touch point stage that "lead customers to continue or discontinue in their purchase journey" (Lemon & Verhoef, 2016:76).

The evaluation and analysis phases aim to enhance the in-store customer journey to ensure a higher level of customer experience, resulting in stronger exit barriers from the retail entity's customer base (Voorhees *et al.*, 2017:278). The nature of customer experience and its sequential character captured in journey touchpoints and cues influence customers on a multisensorial level. Customers' experiential responses to these influences evolve as customer needs and wants change, resulting in a continual judgment against response thresholds and experience comparisons that necessitate incessant enhancements to customer touchpoints (Homburg *et al.*, 2017:384,883).

Customer journey enhancements should be based on customer feedback and organisational experiences and primarily focus on adapting and improving future service experiences (Schögel & Lienhard, 2020:889). It should be aimed at retaining customers (Voorhees *et al.*, 2017:272) and enhancing customer loyalty by persuading customers to repeat the in-store customer touchpoint journey from post-purchase to pre-purchase. (Homburg *et al.*, 2017:386). Applying the Homburg principle to this study implies moving from the post-purchase enhancement stage to the pre-purchase expectation stage and renewing and repeating the continuum afresh.

Edelman and Singer (2015:100) refer to the need for retailers to continually refine existing journeys through enhancements and innovations that extend the customer journey, increase the experience value and increase “stickiness”. Siebert *et al.* (2020:56) refer to stickiness as re-patronage brought about by a sense of excitement experienced by customers. Nakata *et al.* (2019:193) argue that re-patronage or repeat purchases and customer loyalty decisions are dependent on and directly result from experiences.

Theoretically, this study’s in-store customer journey ends at the exit phase, the closing stage of the physical post-purchase process. This can be too myopic for customer experience researchers such as Voorhees *et al.* (2017:272), who contend that the objective should be to facilitate multiple repeat purchases. Voorhees *et al.* (2017:275) argue for “a holistic perspective on the customer journey, considering relevant interdependencies between sequential service encounters that contribute to the overall customer experience” to create a seamless customer experience.

Though this study concentrates mainly on in-store customer journey interactions, it acknowledges the importance and impact of the full spectrum of post-purchase activities on the in-store customer experience continuum. Post-purchase customer activities such as usage, consumption, and post-purchase engagements where the product features more prominently (Lemon & Verhoef, 2016:76) impact experience levels.

Voorhees *et al.* (2017:272) also identify customer word-of-mouth interactions, repeat purchase intentions, service recovery efforts, relationship-building encounters and customer surveys as post-purchase activities that can influence future pre-purchase interactions. Although it remains a challenge to examine, assess and evaluate customers' aroused feelings, satisfaction and attitudes associated with post-purchase activities, it is important to customer experience and should be considered by retail management (Grace & O’Cass, 2004:459).

Retailers should be attentive to customer behaviour feedback received or observed during interactions related to the pre-purchase, purchase, and post-purchase processes. Lieberman

(2021:220) emphasises that direct or indirect customer feedback throughout the engagement lifecycle process should be sourced, recorded, evaluated, and acted upon as it provides opportunities for innovation of the experience continuum. Homburg *et al.* (2015:387) identified the need for retailers to develop a customer experience response orientation (to elicit multiple experiential responses) that allows for continuous innovation, builds trust, and illustrates empathy towards customer requirements (Lemon & Verhoef, 2016:82; Lieberman, 2021:220).

In referring to Disney's Magic Band as a mechanism to refine and improve customer journeys, Lemon and Verhoef (2016:84) suggest that new approaches and technologies should be applied to identify and resolve customer journey frustration points. The application and support of technology to design seamless operations and more effective pre-journey stages can be beneficial to downstream purchase and post-purchase journey stages in furthering stronger experiences (Lemon & Verhoef, 2016:84). It can also assist retailers to connect the post-core and pre-core seamlessly (Voorhees *et al.*, 2017:278).

The application of mobile real-time experience (RET) technology (Macdonald *et al.*, 2012:104) in the final enhance stage of the experience continuum and not only rely on traditional customer survey-based research has the potential to better customer insights. RET technology can assist retailers in determining the impact of each of the in-store E-constructs and which influences customer experience the most (Macdonald *et al.*, 2012:106). It might reform marketing from a stimulus-response approach in retail to a "continual process of cocreation" (Macdonald *et al.*, 2012:108).

The final 'E' construct, Enhance, is a rear-view mirror construct, a retrospection not of the same nature as the interactional constructs that form the nucleus of the in-store purchase experience process. It reflects on pre-ceding in-store experience continuum constructs utilising customer feedback and organisational observations to revitalize and improve the experience continuum. The lessons learned will be tested and confirmed again by applying the first experience continuum construct, 'Expectations', a forward-looking construct that might call for minor changes or redesigning the customer in-store experience continuum.

5.9 CONCLUSION

The proposed customer experience continuum made practical in a customer's in-store journey extending over a pre-, core- and post-purchase retail shopping process consists of a sequence of related shopping events that show a positive development (Verhoef *et al.*, 2004:54,55). The 12E-constructs of the customer experience designed continuum represent the fundamental drivers of a retail customer's in-store journey. It incorporates extra- and intra-domestic

experiences and suggests a dynamism between constructs that promotes higher levels of customer experience, re-patronage, and loyalty (Batat, 2019:143).

The continuum displays the multidimensionality of the in-store retail purchasing process comprising of access, decision, transaction, benefit, and post-benefit customer service conveniences, which Keh and Pang (2010:57) declare reflect customers' perceived time and effort expenditure in making purchase decisions. The composition of the proposed 12E-continuum supports the notion by Lieberman (2021:220) that a comprehensive experience starts at pre-customer engagement (discovery, search) and develops through all the in-store purchase engagement phases and beyond geared to create value for the customer and retailer.

The 12E customer journey constructs give retailers a more accurate comprehension of journey characteristics and stages (Batat, 2019:66) that impact customer experience. Customers typically derive value from the cumulative perceptions of all the E-construct touchpoints along the customer journey, as described by Lieberman (2021:220). The efficiency, ease of use, and feasibility of each continuum construct constitute the retail customers' value perceptions and experience of the retail shopping process (Kuehnl *et al.*, 2019:555).

In the application of the 12E' retailers should endeavour to develop and implement cues and structure engagements at each stage that not only create a seamless but also a "fun" experience (Edelman & Singer 2015:92). The objective in the application of the 12Es should be to generate customer emotions that positively impact the lived experience and transform a "shopping journey" into an "experiential journey" (Batat, 2019:76).

In 12Espursuing an experiential journey, the 12Es symbolises the conceptualisation of the customer's experience in each construct that can be perceived as an independent construct (Verhoef, 2009:33-34) but are interlinked and interdependent. These characteristics of the 12Ess propose a solution to Otnes *et al.*'s (2012:368) criticism that experience models are not comprehensive enough to allow retailers to tailor store strategies to each retail experience. The 12E continuum subscribes to this need by offering a range of interactions, describing how interactions differ but complement each other and proposing construct drivers to elicit a complete customer retail experience (Verhoef *et al.*, 2009:33).

The 12E continuum also suggests a solution to De Keyser *et al.* (2020:444) research challenge to identify the interdependencies (Voorhees *et al.*, 2017:270) and linkages between retail store customer journey stages (pre-, core-, post-purchase) and actions (12Es) that constitute the bridges between the different stages.

The proposed retail journey, based on the 12Es, subscribes to Norton and Pine's (2013:13) blueprint for a customer journey:

- It represents a plan on how retailers stage key moments to ensure a total customer experience.
- It includes descriptive scenes and key tactics supporting the staged key moments.
- It proposes a visual and descriptive storyboard-type narrative where key moments evolve into scenes of designed experiences that support the moments.
- It describes processes, protocols, scripts, rituals, acts, tools, and retail staff interactions that support scenes and guides retailers to develop and produce the required experience.
- It identifies and formulates key moments (moments of truth) in the retail purchase process that significantly impact the customer's experience and should be designed for more significant effect and lasting customer impressions.

In conclusion, the 12E continuum embodied in the retail customer journey is derived from a customer-centric approach to customer experience illustrated by an understanding of the real-life sequence of events that retail customers encounter. The sequence of retail events captured in the 12E customer experience continuum intends to deliver value to customers, profitability to retail entities and differentiation from competition (Norton & Pine, 2013:12).

CHAPTER 6 RESEARCH PHILOSOPHY, OBJECTIVES, METHODOLOGY AND DESIGN

6.1 INTRODUCTION

The preceding chapter deliberated the composition of the conceptual customer-centric experience management framework. The twelve constructs of the conceptual management model, organised in a sequential self-renewing continuum, were defined and discussed. The applicability of these constructs in a face-to-face retail store was examined, and from the literature, specific retail tactics that support each of the twelve constructs were identified and discussed.

This chapter is the first of two chapters that discuss the empirical research phases of the study. It provides a background to the research undertaken by referring to the reason for the research, the research philosophy, the problem, the questions, and the research objectives. It discusses the research methodology and design followed to address the research problem. It also answers the research questions and executes the study's objectives.

The preceding literature review chapters, including the detail on the customer experience marketing trinity (customer experience philosophy, service design principles and customer journey methodology), and particularly the twelve retail customer management framework constructs, provided the guiding framework for the study's empirical fieldwork. The preceding chapters also formed the basis for formulating the research problem, dictated the research design and methodology and provided the content for the empirical research instruments.

This chapter also provides the theoretical basis for the next chapter, which deals with reporting the data analysis phase of the study.

6.2 BACKGROUND TO RESEARCH

Scientific research is conducted generally with specific objectives and goals in mind (Brynard & Hanekom, 2006:2). However, as stated by Holmström *et al.* (2009:65), despite efforts from researchers in a variety of disciplines over several decades, the theoretical and academic research interests do not seem to coincide with the interests of managerial practice. This statement emphasises the need to reconfirm scientific research studies' reason and characteristics to ensure that the research design embodies the most salient points.

6.2.1 Reasons for scientific research

In discussing the different ways and methods of acquiring knowledge about the world (epistemology), Bless *et al.* (2013:1) refer to non-scientific (authoritarian, mystical, conventional) and scientific methods. The researchers regard scientific methods as the most reliable in the quest for authentic knowledge.

The characteristics of scientific research should be considered and measured against generally accepted reasons for conducting research. Brynard and Hanekom (2006:2) suggest the following most pertinent reasons for conducting research that are also applicable to this study:

- problem identification
- developing solutions and control mechanisms applicable to problems
- enable and promote rational and factually based decision-making
- enhancing the knowledge and insight about theories
- determining the applicability of specific theories to specific circumstances
- developing new theories or recommending modifications to existing theories

6.2.2 Characteristics of scientific research

The above reasons for research accentuate the most important scientific research characteristics listed by Mokoena, 2020:560):

- Scientific research is focused empirically on establishing and understanding the truth about reality through detached and dispassionate observations from scientists.
- Scientific research involves systematic observations based on a logical order process where a prediction is made once a description and explanation can be provided for an observed phenomenon.
- Scientific research is replicable (with the same circumstances present, the same event can be observed, resulting in the same reasoning, explanation, and prediction) and transmittable (research steps and results can be shared with others transparently).

- Scientific research is reductionism in nature. It reduces the complexity of the reality by only focusing on the essential variables of an identified problem and not those variables that have little or no effect on the problem.
- Scientific research conclusions should be stated in a falsifiable manner that is testable and can be proven to be false through empirical scrutiny.

This study endorses all the above characteristics. This study affords special attention to the statement by Holmström *et al.* (2009:65) that research should not be limited to a simple transfer of knowledge but should be made relevant and practical for practitioners to apply to the benefit of their businesses. The empirical research of this study aspires to enrich marketing and retail practitioners with relevant and practical implementable knowledge to enhance retail customer experiences and create a strategic competitive positioning in the marketplace (Malhotra *et al.*, 2017:7).

6.2.3 Marketing research process

The reasons (Brynard & Hanekom, 2006:2) and characteristics (Bless *et al.*, 2013:8) associated with scientific research also relate to the marketing research process. Leedy and Ormrod (2010:2-5) acknowledge the characteristics associated with research and provide a practical perspective by describing it as a “systematic process of collecting, analysing and interpreting information (data) to increase our understanding of a phenomenon about which we are interested or concerned research in which we intentionally set out to enhance our understanding of a phenomenon and expect to communicate what we discover to the larger scientific community”.

Though research projects can differ in complexity and duration, Leedy and Ormrod (2010:2) believe that some distinct features applicable to all research types can be identified. In addition to the characteristics identified by Bless *et al.*, as cited by Mokoena (2020:560), Leedy and Ormrod (2010:3) emphasize that research, as a “systematic process”, should be supported by a specific plan for proceeding. This plan is expressed in a research design logic (Mouton, 2001:47), through which a researcher indicates preferences regarding the most appropriate methods to conduct research (Mann, 2016:15).

As explained by Mouton (2001:47), the research logic comprises four basic stages: an idea that leads into a research problem phase, then a research design phase, followed by a research process phase that culminates into a thesis. Figure 6-1 illustrates these stages.

Leedy and Ormrod's perspectives on research being a 'process', as illustrated by Mouton (200:47), is also echoed by Malhotra *et al.* (2017:11) who describe the marketing research process as a "function that links the consumer, customer, and public to the marketer through information – information used to identify and define marketing opportunities and problems; generate, refine, and evaluate marketing actions; monitor marketing performance and improve understanding of marketing as a process. Marketing research specifies the information required to address these issues, designs the method for collecting information, manages and implements the data collection process, analyses the results, and communicates the findings and their implications".

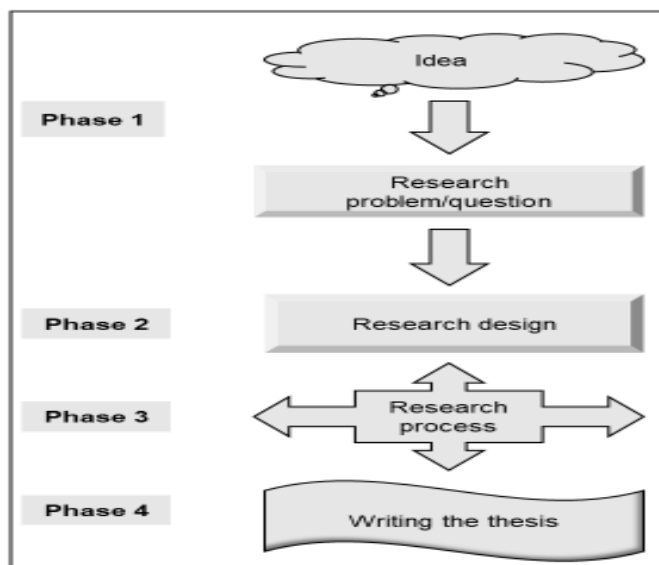


Figure 6-1: The logic of the research process

Source: Adapted from Mouton (2001:47) & Malhotra *et al.* (2017:10)

The marketing research process, as defined by Malhotra *et al.* (2017:9), corresponds with Mouton's process logic but expands the process to six broadly defined stages that include problem definition, developed research approach, developed research design, fieldwork or data collection, data integrity and analysis and finally a communicating research findings stage (Malhotra *et al.*, 2017:10). The stages associated with the marketing research process and the iterations between the stages are illustrated in Figure 6-2.

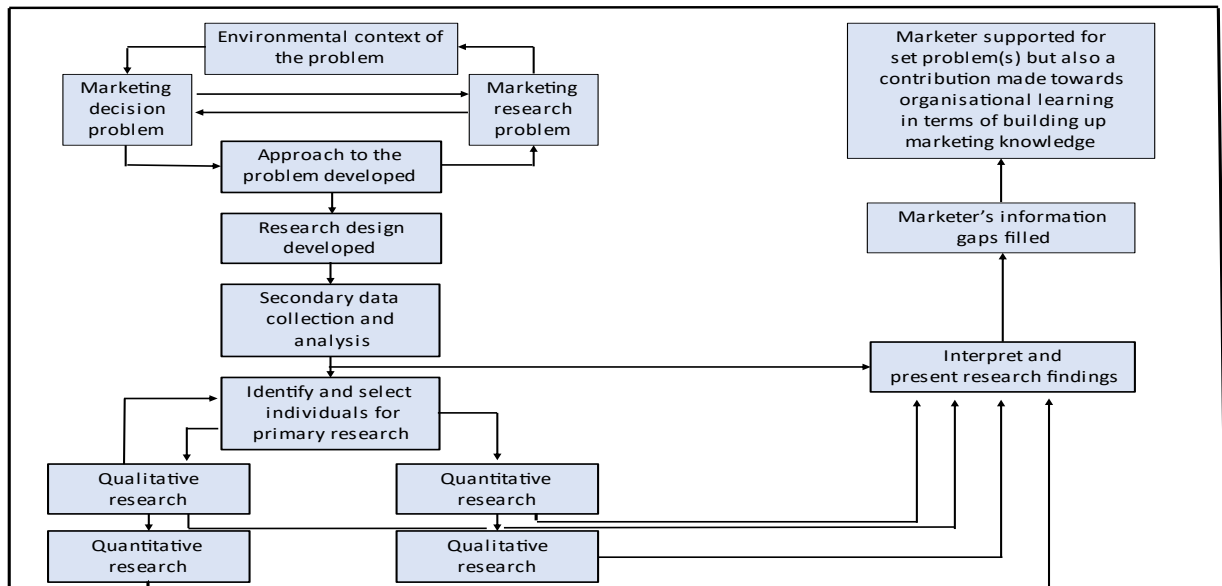


Figure 6-2: The marketing research process

Source: Adapted from Malhotra *et al.* (2017:11)

6.3 RESEARCH METHODOLOGY FRAMEWORK

Research is a process supported by sound reasoning with specific identifiable characteristics. This study chose the research onion analogy (Figure 6-3) from Saunders *et al.* (2019:128) as a guideline to identify the elements to be considered in guiding the formulation of a research methodology. Crotty (1998:1, 2) refers to the methodology framework as “scaffolding” used in building the research process suited to the study’s purposes.

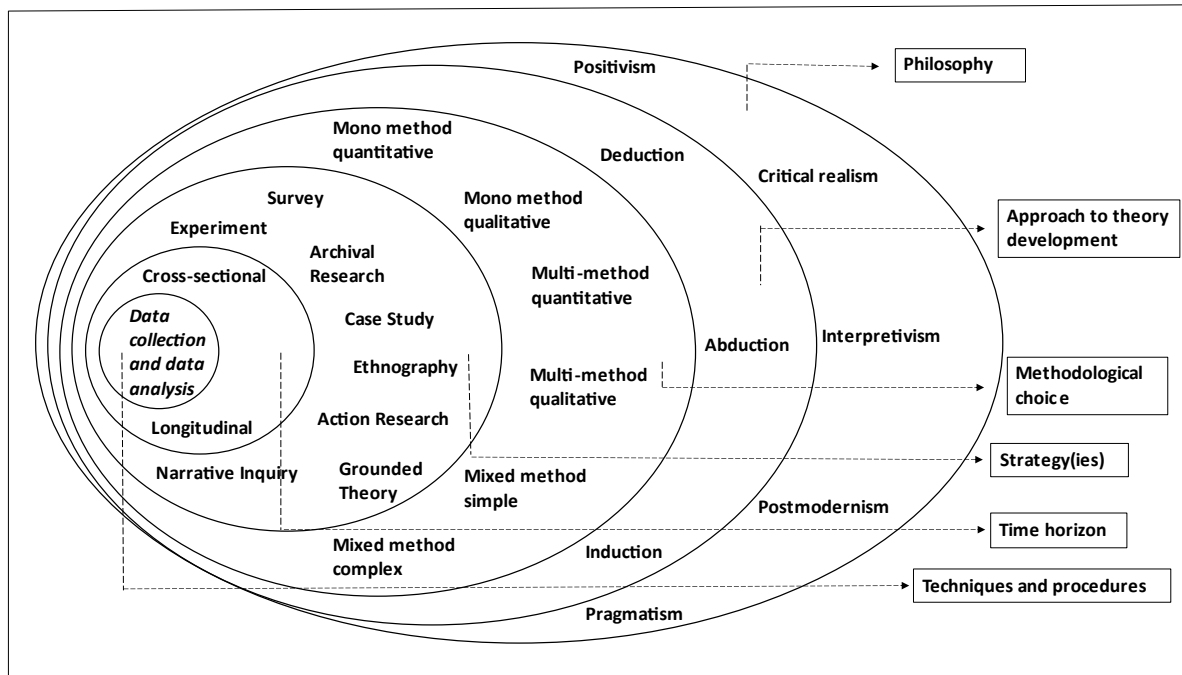


Figure 6-3: Research methodology framework

Source: Adapted from Saunders *et al.* (2019:128)

6.3.1 Research philosophy

The term *research philosophy* refers to “a system of beliefs and assumptions about the development of knowledge” (Saunders *et al.*, 2019:130). It represents the conceptual lens through which the researcher examines the methodological aspects of his research project to determine the research methods that will be used and how the data will be analysed (Kivunja *et al.*, 2017:26).

From the literature review, the current body of knowledge shows little evidence that marketing practitioners, researchers, advisors, and retailers attempt to anchor customer experience journey learnings into a pragmatic retail service designed customer experience journey for retail stores (Baker *et al.*, 1992:445; Goldstein *et al.*, 2002:124; Johnston & Kong, 2011:2; Jones & Vancauwenberghe’s, 2014:3; Kuehnl *et al.*, 2019:551; Otnes *et al.*, 2012:368; Lemon & Verhoef 2016:85; Yuen & Chan, 2010:223). This void is specifically pertinent regarding a pragmatic journey designed around the sensory marketing and behavioural science principles associated with the customer experience philosophy.

This study identified the need for a comprehensive conceptualisation and integration of store environmental elements, selling techniques and retail store service action constructs. The

integration should lead to identifiable, flexible, and manageable retail store service system components (constructs) entrenched into a customer-centric experience journey continuum.

6.3.2 Philosophical assumptions

The choice of research methodologies precedes the assumptions made by researchers (Table 6-1). Creswell (2007:16) fittingly refers to the assumptions in the following manner: “These philosophical assumptions consist of a stance toward the nature of reality (ontology), how the researcher knows what she or he knows (epistemology), the role of values in the research (axiology), the language of research (rhetoric) and the methods used in the process (methodology)”.

An important point of departure in this study is that the research philosophy and method of choice are functions of the study objectives and questions to be answered rather than an “allegiance to metatheoretical dogma” (Osborne, 1994:186). The study is based on a blend of four main philosophies, critical realism, pragmatism and interpretivism, with an emphasis on positivism, accentuating the empirical nature of the study. Though these philosophies differ in characteristics, each representing a different model making claims about knowledge, it overlap and reinforce each other (Creswell, 2007:15-16), hence their application in this study.

The literature review represents a historical analysis of changes in marketing theory and the development of a customer experience philosophy (critical realism). This is supplemented by pragmatic ontology, epistemology, and axiology of improving current retail store practices (pragmatism), leading to a richer, more comprehensive understanding of the multiple socially constructed retail store and retail customer realities (interpretivism).

Approaching the study with a positivism predisposition (quantitative approach preference) provided for the benefits associated with the natural sciences (Coolican, 2014:54,60). It emphasised facts and a chain of causation that supported objectivity, rigour and measurement and enabled “the prediction and explanation of marketing phenomena” (Malhotra *et al.*, 2007:155).

It is this researcher’s conviction that no single philosophy will rigidly support the objectives of the study or reflect the researcher’s exact beliefs regarding customer experience in retail stores (Creswell & Miller, 1997:34). The decision to apply a blend of philosophies originated from perspectives derived from the preceding literature study that “suggests a general orientation to inquiry” that influences theory development (Creswell & Miller, 1997:34).

Table 6-1: Philosophical assumptions

Assumption type	Questions	Continua with two sets of extremes		
		Objectivism	-	Subjectivism
Ontology (World perception, nature of reality or being)	• What is the nature of reality? • What is the world like? • For example: – What are organisations like? – What is it like being in organisations? – What is it like being a manager or being managed?	Real External One true reality (universalism) Granular (things) Order	-	Nominal/decided by Convention Socially constructed Multiple realities (relativism) Flowing (processes) Chaos
Epistemology (View regarding what is acceptable knowledge)	• How can we know what we know? • What is considered acceptable knowledge? • What constitutes good quality data? • What kinds of contribution to knowledge can be made?	Adopt assumptions of the natural scientist Facts & Numbers Observable phenomena Law-like generalisations	-	Adopt the assumptions of the arts and humanities Opinions, Written, spoken and visual accounts Attributed meanings Individuals and contexts, specifics
Axiology (Role of values)	• What is the role of values in research? Should we try to be morally neutral when we do research, or should we let our values shape research? • How should we deal with the values of research participants?	Value-free Value-bound	-	Detachment Integral and reflexive

Source: Adapted from Saunders *et al.* (2019:135)

6.3.3 Approach to theory development

This study was not aligned with a single philosophy but applied a blended philosophical approach so as not to be restrained by paradigmatic assumptions in theory development. It favoured a more pragmatic approach to be primarily guided by the research questions and aimed to understand behaviour rather than to predict it (Harrison & Reilly, 2011:8).

Saunders *et al.* (2019:160) identifies three key approaches to theory development: deduction, induction and abduction and explains each as per Table 6-2. This is primarily a deductive research study for reasons listed in Table 6-2. It started with a theory, the customer-centric experience journey continuum developed from marketing research literature combined with retail market observations that were tested through an empirically focused designed research plan (Malhotra *et al.*, 2017:160; Saunders *et al.*, 2019:153).

Table 6-2: Approaches to theory development, deduction, induction, and abduction

	Deduction	Induction	Abduction
Logic	In a deductive inference, when the premises are true, the conclusion must also be true	In an inductive inference, known premises are used to generate untested conclusions	In an abductive inference, known premises are used to generate testable conclusions
Generalisability	Generalising from the general to the specific	Generalising from the specific to the general	Generalising from the interactions between the specific and the general
Use of data	Data collection is used to evaluate propositions or hypotheses related to an existing theory	Data collection is used to explore a phenomenon, identify themes and patterns and create a conceptual framework	Data collection is used to explore a phenomenon, identify themes and patterns, locate these in a conceptual framework and test this through subsequent data collection and so forth
Theory	Theory falsification or verification	Theory generation and building	Theory generation or modification; incorporating existing theory where appropriate, to build new theory or modify existing theory

Source: Saunders *et al.* (2019:153)

The detailed deductive reasoning process followed by this study is very similar to what Malhotra *et al.* (2007:161) describe as:

- “An area of enquiry is identified, set in the context of well-developed theory, which is seen as vital to guide researchers.
- The issues upon which to focus an enquiry emerge from the established theoretical framework.
- Specific variables that the researchers deem should be measured are identified. An ‘instrument’ to measure specific variables is developed.
- ‘Participants’ give answers to set and specific questions with consistent language and logic.
- The responses to the set questions are analysed using a previously established theoretical framework.
- From testing theory in a new context, they seek to develop existing theory incrementally”.

Inductive reasoning, as described by Coolican (2014:330) and Guest *et al.* (2012:2), working with qualitative data permitting the confirmation of the theory, was also applied in the study. The

study showed trademarks of phenomenological research, proposing an example of a “human science method that emphasizes descriptions of meaning structures of lived experience” (Osborne, 1994:186).

Based on a blended philosophical approach with a primarily deductive focus, supplemented by a secondary inductive reasoning process, provided for a comprehensively structured research study. It affected Saunders *et al.*’s (2019:130) opinion that a “well-thought-out and consistent set of assumptions will constitute a credible research philosophy, which will underpin your methodological choice, research strategy and data collection techniques and analysis procedures”. The adopted primary deductive and secondary inductive reasoning processes played an important role in deciding on the most appropriate methodological choice to support the study problem and objectives.

6.3.4 Methodological choice

A leading indicator of a researcher’s methodological choice is the type of data required (numerical, textural, or both) to respond to a research question (Williams, 2007:65). Williams identifies quantitative (numerically orientated), qualitative (textural orientated), and mixed methods (requiring both numerical and textural data) as the most common approaches to conduct research (Williams, 2007:65).

This study’s choice of research methodology was guided by the research philosophy and approach to theory development, both being a function of the research problem, objectives, and questions (Leedy & Ormrod, 2010:6).

6.4 RESEARCH PROBLEM, OBJECTIVES AND QUESTIONS

Over several decades, marketing research across a broad spectrum of literature identified unacceptable service levels as a reason customers switched to competitors (Goldstein *et al.*, 2002:119; Klimek *et al.*, 2017:2; Scott, 2016:18).

Meyer and Schwager (2007:119) also highlight this tendency, stating that without the root cause for perceived low service levels, newfound strategies such as the focus on customer experience do not necessarily result in higher customer ratings and lower switching tendencies. This beckons the question: What, then, is the problem? Why does implementing customer experience strategies, or any other intervention in this regard, not consistently deliver the desired results?

6.4.1 Research problem

Researchers such as Batat (2019:144), Goldstein *et al.* (2002:124) and Meyer and Schwager (2007:119) argue that the answer lies in the existence of a discrepancy, a substantive gap that exists between a customer's expected customer experience and the experience provided by a service provider. Klimek *et al.* (2017:2) assert the blame on companies using customer-centric words but display non-customer-centric actions. Otnes *et al.* (2012:368) refer to the complexity of customer interactions and the ignorance of customer experience theory scholars and practitioners about the range of interactions, key retail elements associated with these interactions and how these interactions differ across interactional experiences.

The fundamental problem deliberated in this study is the **discrepancy or gap between a retail customer's expected customer experience and the actual experience provided in a retail shop by a service provider**. This discrepancy or gap is a leading indicator for poor customer service results, low customer experience ratings and high customer switching-to-competitor incidences.

Based on the stated problem, the study seeks to provide an answer to the following question: *Can the discrepancy that exists between customers' retail store experience expectancies and customers' actual in-store retail experience, as depicted in low customer experience ratings, be bridged by the implementation of a pragmatic multifaceted customer-centric experience management framework entrenched in a retail store customer journey?*

6.4.2 Primary and secondary study objectives

Based on the identified research problem, the following primary and secondary study objectives were formulated:

6.4.2.1 Primary objective

The primary objective of this study was to propose an integrated customer-centric experience management framework intended to reduce the discrepancy between retail customers' experience expectancies and customers' actual in-store retail experience to improve customer experience levels that positively impact customer satisfaction, customer engagement, and customer re-patronage.

6.4.2.2 Secondary objectives

The following secondary objectives were formulated to address the primary objective:

- To conduct an academic literature review of contextualising the customer experience construct. In particular, regarding its foundations in marketing theory and its evolutionary development from inter-connecting antecedental marketing concepts from which it originates.
- To recommend a customer flow structure (a continuum) consisting of retail service system components, posturing as store environmental clues, purposefully incorporated into a customer journey design to elicit multi-dimensional experiences (sensorial, emotional, cognitive, pragmatic, lifestyle and relational) that define, conceptualise, and circumscribe the customer experience domain.
- To establish the value in practice, and implicitly, the contribution to theory, of the conceptual management framework by evaluating each of the proposed service system components' potential effect on customer experience levels.

To establish if the proposed service system components impact customer experience directly and positively affect customer engagement, satisfaction, and re-patronage.

6.4.3 Research questions

The following primary research question was answered to achieve the study objectives:

- Does the conceptual customer-centric management framework potentially bridge the discrepancy between retail customers' experience expectancies and customers' actual in-store retail experience and lead to improved customer experience levels that positively impact customer satisfaction, engagement, and re-patronage?

The following secondary questions were addressed to answer and provide context to the primary research question:

- What are the foundational roots of the customer experience construct in marketing theory?
- What role does a retail customer journey, based on a service flow design supported by store environmental clues, play in bringing forth multi-dimensional customer experiences?
- Do the conceptual management framework's service system components trigger customer emotions that elicit positive customer experiences?

- Does a positive customer experience directly and positively affect customer satisfaction, engagement, and re-patronage in a retail store?

6.5 SCOPE OF THE STUDY

This section describes the field of study, industry and geographical demarcation.

6.5.1 Field of Study

This study is related to the broader theme of marketing, customer service, customer service systems, customer journeys, customer satisfaction, customer experience, and customer patronage.

The focus was on the narrower concept of customer experience and its application in designing and developing a customer experience journey aimed at South African retail stores. The journey is the instrument, or tool, to elicit specific sought-after multi-sensory customer experiences during their flow and interaction with service system components (including staff) in a retail store.

6.5.2 Industry demarcation

This study focused on the South African Communication Sector operating as Communication Service Providers (CSP) through owned and operated retail stores networks. Although these entities utilise several customer touchpoints, including on-line, home delivery and retail stores, this study only dealt with customer experience journeys associated with physical retail stores.

6.5.3 Geographical demarcation

Physical retail stores associated with the South African Communication Sector stretch across all nine South African Provinces, i.e., the Western Cape, Northern Cape, North-West, Free State, Limpopo, Mpumalanga, Gauteng, KwaZulu Natal and Eastern Cape.

Given the importance of the Gauteng Province as South Africa's economic hub, the study focused predominantly on retail customers situated in the metropolises of the Gauteng Province (54%), Johannesburg and Pretoria. Retail customers in the Western Cape (19%) and Kwa Zulu Natal provinces (15%) also played an important role in the study's focus, bringing the contribution of the three provinces to close to 90%.

6.6 RESEARCH METHODOLOGY

Ojo (2009:392) describes research methodology as a system of explicit rules and procedures on which research is based and against which claims of knowledge are evaluated. It is important to the validity of a research study and the reliability of its findings (Jajoo, 2016:51).

Leedy and Ormrod (2010:6) provide the following comprehensive description and explanation of research methodology: “Underlying and unifying any research project is its methodology. The research methodology directs the whole endeavour: It controls the study, dictates how the data is acquired, arranges them in logical relationships, sets up an approach for refining and synthesizing them, suggests a manner in which the meanings that lie below the surface of the data become manifest, and finally yields one or more conclusions that lead to an expansion of knowledge. Thus, research methodology has two primary functions:

- To dictate and control the acquisition of data
- To corral the data after their acquisition and extract meaning from them

More simplistically, Leedy and Ormrod (2010:12) conclude by defining research methodology as “the general approach the researcher takes in carrying out the research project”.

The study’s research methodology comprised two phases. Phase one consisted of a theoretical framework based on a marketing literature review, analysing key antecedents of customer service, customer satisfaction and customer experience. Furthermore, the review focused on definitions and key determinants of the customer experience philosophy, service design principles, and the application of the customer journey methodology.

The theoretical analysis was anchored in a conceptual customer-centric service system design and flow structure. The flow structure aimed to evoke multi-sensory experiences as depicted in a conceptual customer-centric management framework for a customer experience journey in a physical retail store (Chapter 1, Figure 1-5). The conceptual management framework formed the basis for phase two of the study.

Phase two of the study consisted of an empirical study aimed at collecting data from a population of South African retail customers, retail store managers and retail training specialists. The data related to respondents’ and participants’ requirements, experiences, opinions and beliefs about customer-centric management processes and management constructs applied in a retail store that impact a customer’s in-store experience.

The empirical research aimed to concisely test, confirm, and explain the conceptual management framework's processes, variables, and constructs. This is to create an understanding of the conceptual framework, how it functions in the context of a physical retail store, how it should be operationalised, and what impact it has on retail store customer experiences.

6.6.1 Theoretical framework for understanding customer experience trinity

A theoretical framework derived from marketing literature consisted of a review of a cross-section of a comprehensive body of marketing-related scholarships. It focussed on definitions, theories, models, and data relevant to the marketing trinity. The latter, consisting of customer experience, service design and customer journeys, were discussed in detail in Chapters 3 and 4. It also focused on empirical findings of previous research and measuring instruments that had been developed and were applicable to this field of study (Mouton, 2001:87). The purpose of the literature review was to contextualise the study within existing marketing research (Becker & Jaakkola, 2020:630) on marketing trinity elements. To provide more clarity on the scope, boundaries, antecedents, and consequents of the trinity and to identify opportunities to contribute to the current body of knowledge on all three elements of the trinity and the symbiosis between them.

This review mainly analysed secondary textual sources such as books, conference proceedings, reference materials (indices and abstracting services), journal articles, unpublished theses and dissertations, newspapers, magazines, and subject-relevant reports. Internet sources through search engines that included Google, Yahoo, Web crawler, and Ananzi were also consulted as secondary sources. This supplements information from electronic databases such as EbscoHost, Emerald, ERIC, and Academic Search Premier. The latter were extensively used as primary sources of relevant information.

The literature review positioned the field of study within the macro marketing, meso customer management and micro customer experience body of knowledge. It assisted in defining and conceptualising the research topic concerning physical customer touchpoints such as retail stores. It enabled identifying and applying research design methodologies appropriate to this study. More specifically, the literature review assisted in establishing:

- The determinants and characteristics of customer service quality, customer satisfaction and customer experience.

- The cognitive drivers (clues) embedded in customer experiences that enhance customer service within retail store environments.
- The service system components affecting cognitive drivers of flow experiences that impact customer satisfaction and patronage and how it elicits favourable experiences that trigger positive multi-sensory customer emotions and thus heightened customer experiences.
- A detailed insight into existing conceptual and structural models for customer experience enables identifying process features of service system components that affect customer experience.
- The characteristics and role of service design and the customer journey methodology are lifetime value-creation tools for both customers and companies alike.
- A conceptual design of an integrated management framework of service system components that elicit multi-sensory flow experiences and, in turn, influence customer experience in a retail store environment.

Customer needs and wants concerning sought-after retail store experiences became evident from the literature review. The review provided more clarity in defining and explaining the customer experience concept. The proposed empirical research studies further added value in providing new insights into retail customer behaviour and contributed new knowledge to the customer experience journey philosophy and methodology featuring so prominently in marketing and customer behavioural sciences.

6.6.2 Empirical research

From the literature review, key antecedents were identified, analysed, and positioned within an in-store service system design that formed the basis for a customer journey flow structure. The conceptual management framework as per Chapter 1, Figure 1-5, consisting of key activity-based constructs and ensuing experience journey continuum, is intended to shape customer perceptions and results into a positive customer experience, leading to customer satisfaction, customer engagement and customer re-patronage within a retail customer touchpoint.

The conceptual management framework, underpinned by the literature review, forms the basis for the empirical phase of the study. The empirical phase guides the use of the most appropriate research design, research methods, sample design, research and testing instruments, methods of data collection and procedures for data collection and analysis (Mouton, 2001:148).

6.6.3 Approaches to empirical research

Williams (2007:65) states the three most common approaches to conducting research are quantitative, qualitative, and mixed methods. This is supported by Saunders *et al.* (2016:128), who identifies several variations within the three approaches as illustrated in the 'methodological choice' layer of Figure 6-3.

In exploring quantitative research methods, Williams (2007:66) concludes that research methodology is independent of the researcher and that data is used to objectively measure reality and create meaning to relational questions of variables within the research. In creating meaning through quantitative analysis, Leedy and Ormrod (2001:102) noted that quantitative researchers seek explanations and predictions that generate other persons and places. The intent is to establish, confirm, or validate relationships and develop generalisations contributing to theory.

Qualitative research methods relate to the investigation of social phenomena from a participant's viewpoint, where discovery takes place in "a natural setting that enables the researcher to develop a level of detail from being highly involved in the actual experiences" (Williams, 2007:67). This method is less structured in description than quantitative methods where the researcher assumes an observer role, suggesting a strong correlation between the observer and the data. The researcher focuses on describing, explaining, and interpreting data collected from posed questions to enable the formulation and building of new theories (Williams, 2007:67).

Creswell (2009:204) describes the mixed methods approach as applying the best of quantitative and qualitative methods. Williams (2007:70) posits that the mixed methods approach enables the application of deductive and inductive analysis in the same research study. This method allows researchers to design a single research study that answers questions about the phenomenon's complex nature from the participants' point of view and the relationship between measurable variables (Williams, 2007:70).

Groenewald (2004:42) believes that some researchers get overwhelmed by the plethora of research methodologies, making the selection of an appropriate research design for a particular study difficult. In mitigating this risk, this study used the research problem (paragraph 6.4), the research philosophy (paragraph 6.3.1), the approach to theory development (paragraph 6.3.3) and the chosen research methodology as guiding principles in selecting the most appropriate research process and supporting research design.

6.7 RESEARCH DESIGN

As defined by Malhotra et al. (2007:61), a research design is “a framework or plan for conducting a marketing research project. The design details the procedures necessary for obtaining the information needed to structure or solve marketing research problems”. As illustrated in Figures 6-2 and 6-3, the research design phases defined the masterplan of methods used to sample, collect, and analyse data (Mouton, 2001:55; Shiu *et al.*, 2009:61).

Leedy and Ormrod (2010:3) refer to research design as a purposeful way to acquire data relevant to their research problem. Depending on the research question, different designs and methods will be more or less appropriate. Yin (2003:20) describes the “purposeful way” as a “logical sequence that connects the empirical data to a study's initial research questions and, ultimately, to its conclusions”. Saunders *et al.* (2019:151) concur that the research problem and questions are the most important determinants of a research design and strategy. Saunders *et al.* (2019:151) further suggest that a research design should promote a pragmatic emphasis on practical outcomes.

This study used a blended research philosophy (critical realism, pragmatism and interpretivism with a positivism predisposition) to guide the most appropriate research process. However, it also applied learnings from preceding literature studies. In a systematic and critical evaluation of customer experience theories and considering and reviewing multiple research studies on the same research subject, key issues and methods of data collection were noted and taken into consideration in formulating a research approach and design (Chapman & McNeill, 2005:31; Malhotra *et al.*, 2017:45).

Following the above perspectives on a research design, the reasoning applied in describing the study's preferred research philosophy, and the researcher's own beliefs and assumptions (Saunders *et al.*, 2019:131), the process followed was a mixed methods approach. This combinational approach reaps the benefits of quantitative and qualitative research and enables a more holistic perspective on the research problem (Creswell, 2009:203; Williams, 2007:65). Creswell and Miller (1997:39) regard this approach as pragmatic in that researchers increasingly combine positivist (quantitative) and interpretive (qualitative) approaches in studies.

6.7.1 Mixed methods studies

Johnson *et al.* (2007:123) describe mixed methods research as: “the type of research in which a researcher or team of researchers combines elements of qualitative and quantitative research approaches (e.g., use of qualitative and quantitative viewpoints, data collection, analysis,

inference techniques) for the broad purposes of breadth and depth of understanding and corroboration". Creswell and Zhang (2009:612) define mixed methods as "a research procedure involving the collection, analysis, and integration (or combination) of both quantitative and qualitative data to answer research questions".

Creswell (2007:23) argues that researchers more and more "look to many approaches to collecting and analysing data rather than subscribing to only one way (e.g., quantitative or qualitative)". The objective of a mixed methods approach is to reap the benefits of complementarity, where the strengths of one research method enhance the performance of another research method (Morgan, 1998:365).

In considering when to employ a mixed-method approach, Harrison (2013:2156) argues that research questions best suited for mixed-method inquiry include those in which one data source may be insufficient. Where results need to be explained, and findings need to be generalised, a second method is necessary to enhance a primary method, and an overall objective can be best addressed with multiple phases or projects.

The mixed methods design empowers researchers with the best two worlds (Creswell, 2009:204). Combining quantitative and qualitative research broadens the understanding of a research subject by using "one approach to understand better, explain, or build on the results from the other approach". This research design, its rationale, purpose and added value is deemed suitable and effective for meeting this study's primary and secondary study objectives (Morgan, 1998:366).

6.7.2 Rationale, purpose and added value of mixed methods

An important consideration in deciding on an appropriate research design is whether the chosen design best addresses the research questions. Also, if the barriers associated with the design can be surpassed by the benefits associated with the design. Mixed methods research requires extensive time, resources, and effort, and researchers must develop broader skills (Molina & Azorin, 2011:8).

Mixed methods research as the preferred research methodology of this study enabled the researcher to produce a comprehensive research outcome that was not available through other approaches. The benefits of mixed methods (Table 6-3) provided the researcher with a broader picture of the study problem, more confidence in findings, an improved study component, a wider variety of views, and a way of researching customer experience in physical retail stores that was otherwise not possible (O'Cathain *et al.*, 2007:148).

6.7.3 Mixed methods design

Creswell (2007:107) refers to four types of mixed methods design; “exploratory (e.g., to investigate phenomenon little understood), explanatory (e.g., to explain patterns related to the phenomenon), descriptive (e.g., to describe the phenomenon), and emancipatory (e.g., to engage in social action about the phenomenon). In later studies, Creswell (2009:211) extends and broadens the four types to six categories of mixed methods research designs: sequential explanatory, sequential exploratory, sequential transformative, concurrent triangulation, concurrent embedded and concurrent transformative (Table 6-4).

Table 6-3: Rationale, purpose, and benefits of mixed methods

Methodological pluralism vs monomethod	
Greene <i>et al.</i> , 1989:267,270	• Complementarity - seeking elaboration, illustration, enhancement, and clarification of the results from one method with the findings from other methods) • Development - when the researcher uses the results from one method to help develop or inform the use of the other method • Initiation - discovering paradoxes and contradictions that lead to the research questions being reframed • Expansion - seeking to extend the breadth and range of inquiry by using different methods for different inquiry components
Teddlie & Tashakkari, 2003:4	• Provides better opportunities for answering research questions, better inferences, a greater diversity of divergent views.
Collins <i>et al.</i> , 2006:76	• Participant enrichment - ensure that each participant selected is appropriate for inclusion • Instrument fidelity - assess the appropriateness and/or utility of existing instrument(s); create new instrument(s) and assess appropriateness and/or utility • Treatment integrity - assess fidelity of intervention • Significance enhancement - Facilitate thickness and richness of data; augment interpretation of findings
O’Cathain <i>et al.</i> , 2007:148	• Can access knowledge or insights unavailable to a qualitative study and a quantitative study undertaken independently • A wider picture, more confidence in findings, an improved study component, a wider variety of views, a way of researching an issue that was otherwise impossible, or an understanding of why and where a study component failed
Molina-Azorin, 2011:8	• Provide a better understanding of research problems and complex phenomena than either approach alone • Incorporating the strengths of both methodologies • Reducing problems associated with singular methods

Methodological pluralism vs monomethod	
	• Triangulating - enhancing the validity of inferences
O'Hanlon, F 2019:111	• Achieving a robust research design

Table 6-4: Categories of Mixed Methods Research

Type of design	Attributes
Sequential Explanatory	• Quantitative data collection and analysis occurs first, followed by qualitative data collection and analysis • The qualitative phase is used to explain and interpret quantitative results (explain the relationships)
Sequential Exploratory	• Qualitative data collection and analysis occurs first (to explore the phenomenon) followed by quantitative data collection and analysis. • Quantitative phase is used to help interpret qualitative results • The method used to test elements of an emergent theory resulting from the qualitative phase
Sequential transformative	• Two distinct data collection phases, one following the other • Theoretical lens is used in structuring the design • Places mixed-method research within a transformative framework
Concurrent Triangulation	• Most familiar of six mixed methods designs • Data collection for quantitative and qualitative data occurs concurrently and databases are compared for convergence or difference • Assists by validating and substantiating results
Concurrent embedded	• Data collection for both quantitative and qualitative data occurs simultaneously • Primary method guides study, and secondary method supports • Sometimes used to enrich the description of sample participants or add a broader perspective
Concurrent transformative	• Concurrent collection of quantitative and qualitative data • Guided by the researcher's use of a specific theoretical perspective or conceptual framework

Source: Adapted from Creswell (2009:211)

Harrison (2013:2156) concurs with Creswell's (2009:211) assessment but concludes with five mixed methods design types. These design types are exploratory designs, explanatory designs, embedded designs, convergent designs, and hybrid designs. Harrison (2013) identifies these design types through a detailed content analysis of more than two thousand Journal of Business Research articles published between 1990 and 2010.

Research conducted by Creswell (2009:221), Creswell and Creswell (2005:319), Harrison (2013:2154, 2157), Lai and Chang (2005:446, 452) and Malhotra *et al.* (2017:174, 289) on mixed methods suggest that complementarity in research can be achieved through variable analysis, correlation, and relationship-interpretations for variables. Such variables are defined in the conceptual customer-centric management framework.

However, since the primary emphasis is on variable relationships through quantitative analysis, Mason (2006:16) states that it could result in a limited capability to explain associations between variables. Or it can fail to establish a comprehensive understanding of the mechanisms of the association process. This study's empirical research embarked on a complementary qualitative research phase to achieve increased complementarity to counter these risks,.

This study acknowledged the value of quantitative research as it incorporates "ontological, epistemological, axiological, rhetorical and methodological assumptions and principles" (Leech & Onwuegbuzie, 2009:266). The preference towards a predominantly quantitative approach in the mixed methods study (Harrison, 2013:2156; Malhotra *et al.*, 2007:155) suggested a sequential and not a concurrent approach. This approach is supported by Leech and Onwuegbuzie's (2009:268) three-dimensional typology of mixed methods designs with the preference for a "partially mixed sequential dominant status design" (Leech & Onwuegbuzie's, 2009:270) with an emphasis on the explanatory and a supportive focus on the exploratory.

6.7.3.1 Explanatory versus exploratory mixed methods designs

In exploring mixed method design types and the rationales associated with each design, the advantages and disadvantages of each method appeared to be very much alike (Creswell, 2009:211; Creswell & Zhang, 2009:615; Harrison, 2013:2154).

An exploratory approach leads with a qualitative study and uses quantitative data and analysis to assist in interpreting qualitative findings (Creswell, 2009:212). Thus, the initial qualitative exploration leads to improved quantitative data collection and results to establish if the qualitative themes can be generalised to a population sample. (Creswell & Zhang, 2009:615).

Creswell (2009:211, 212) suggests that an exploratory design applies when "exploring a phenomenon", when testing elements of an emergent theory and when a researcher needs to develop an instrument because existing instruments are inadequate or unavailable. Harrison (2013:2156) concurs and further clarifies that "exploratory designs are useful for exploring relationships when study variables are unknown; developing new instruments, based on initial qualitative analysis; generalizing qualitative findings and refining or testing a developing theory".

Harrison (2013:2157) conversely states that explanatory designs focus first on collecting and analysing quantitative data to explain relationships or study findings. A qualitative follow-up is then employed to build on initial quantitative data and provide a better understanding of the quantitative results (Creswell & Zhang, 2009:615). This approach is “suited to explaining and interpreting relationships” (Creswell, 2009:211).

The elements associated with explanatory and exploratory designs equally apply to this study, and either approach could serve its purpose. However, the solid quantitative learnings that are associated with an explanatory design (Creswell, 2009:215) are preferred by this researcher. The researcher values the strength of survey research to uncover generalizable trends in specific populations and qualitative follow-up” that can be used “to address gaps that result from unique findings. Thus, the explanatory design has the potential to illuminate the strengths of survey data (Harrison, 2013:2158).

6.7.3.1.1 Explanatory sequential design

Quantitative data collection and analysis, as the principal phase of empirical research, formed the core of this study. It was followed sequentially by a complementary phase consisting of collecting and analysing qualitative data to build on the results of the quantitative phase (Creswell, 2009:211). The sequence of the mixed methods study is illustrated in Figure 6-4.

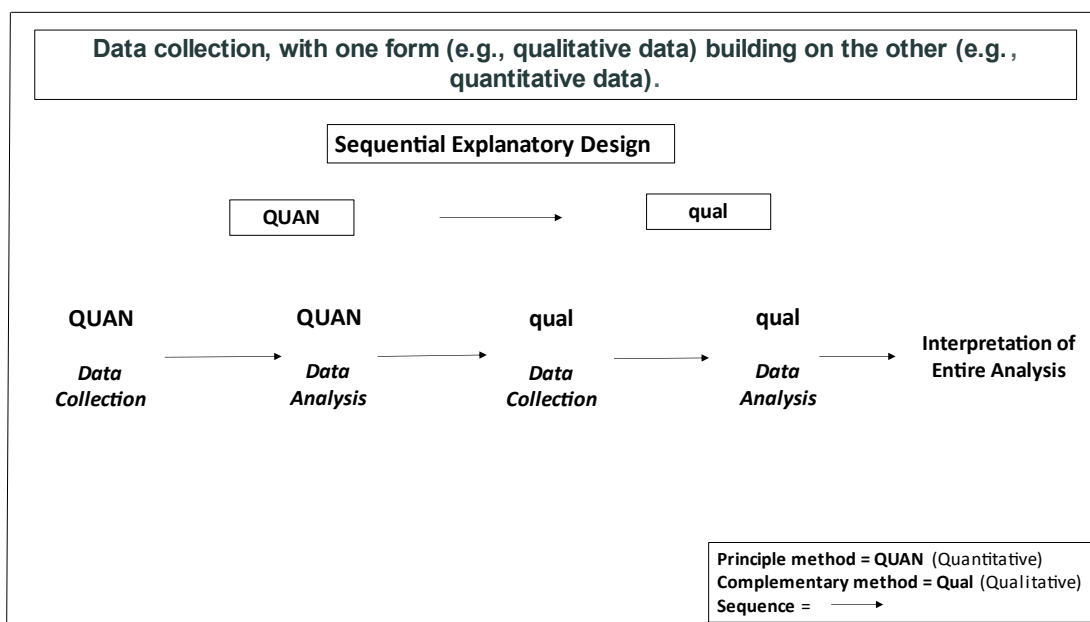


Figure 6-4: A mixed method study with a sequential explanatory design

Source: Adapted from Creswell (2009:209)

The preferred mixed method design type, explanatory (illustrated in Figure 6-3), is to answer the “why” and “what” questions (Jajoo, 2016:50) of customer experience in a retail store. Of all the mixed methods approaches, the explanatory design is deemed the most appropriate as it goes beyond explaining the customer experience phenomenon and identifies the forces that caused or created the desired competitive customer experience in retail stores (Jajoo, 2016:50).

The explanatory sequential research design also enabled the researcher to test the twelve construct forces (12Es) influencing customer experience in retail stores. This methodological approach guided the researcher to not only address the “why” and “what” questions but also confirmed the twelve constructs of the conceptual management framework and explained the “how” of the framework (Nemaenzheup, 2010:143). The design furthermore provided for the use and application of qualitative data to assist in explaining and enhancing initial data obtained from the quantitative study and to address the “how” of the framework more comprehensively (Harrison & Reilly, 2011:17).

The advantage of applying an explanatory sequential design lies not only in a bias towards quantitative learning but also in its simplicity and ease of implementation (Creswell, 2009:211). The simplicity was found in the design’s ambiguously defined and demarcated twelve process stages. However, Creswell is quick to caution that the two phases of the explanatory sequential design imply a prolonged data collection process and a time-consuming analysis of two data sets, numeric and text (Creswell, 2009:205).

6.7.3.1.2 Complementary exploratory design

The purpose of the chosen principal design method (quantitative) with supporting complementary design method (qualitative) is illustrated in Figure 6-5 (quadrant 3).

Harrison and Reilly (2011:16) acknowledge the opportunity to explore quantitative findings further through a qualitative follow-up. This suggests that, in the case of a developed conceptual framework or model, in-depth interviews, based on questions derived from the quantitative data can be conducted in a qualitative phase. The purpose is to “triangulate the study findings from the survey data and to generate further understanding of the underlying phenomenon” (Jayachandran *et al.*, 2004:225). Small (2011:63) supports this approach.

The value of triangulation lies in checking the accuracy of data that was collected from the quantitative survey through follow-up in-depth interviews of verification under a qualitative phase (Chapman *et al.*, 2005:23). The complementary exploratory phase thus enabled the researcher to further examine and obtain clarity on any surprising results derived from the quantitative study

(Creswell, 2009:211; Creswell & Zhang, 2009:614). It also empowered the researcher to “obtain in-depth insights and high construct validity on the research topic” (Harrison & Reilly, 2011:15).

	Priority Decision	
	Principal Method: <i>Quantitative</i>	Principal Method: <i>Qualitative</i>
Sequence Decision	1. Qualitative Preliminary qual → QUANT Purposes: Smaller qualitative study helps guide the data collection in a principally quantitative study. Can generate hypotheses, develop content for questionnaires and interventions, etc. Example: Retail management and retail staff focus groups help to reduce and address inherit bias that exist between management/staff retail perceptions, beliefs and experiences when developing the quantitative study.	2. Quantitative Preliminary quant → QUAL Purposes: Smaller quantitative study helps guide the data collection in a principally qualitative study. Can guide purposive sampling, establish preliminary results to pursue in depth, etc. Example: A survey of different geographical located retail customer groupings for more extensive ethnographic data collection.
	3. Qualitative Follow-up QUANT → qual Purposes: Smaller qualitative study helps evaluate and interpret results from a principally quantitative study. Can provide interpretations for poorly understood results, help explain outliers, etc. Example: In-depth interviews help to further explore quantitative findings through a qualitative follow-up. The assists in generating further understanding of the underlying study phenomenon.	4. Quantitative Preliminary QUAL → quant Purposes: Smaller quantitative study helps evaluate and interpret results from a principally qualitative study. Can generate results to different samples, test elements of emergent theories, etc. Example: A national-wide survey of retail customers pursues earlier results from a retail store case study.
	Complementary Method: <i>Preliminary</i>	Complementary Method: <i>Follow-up</i>

Figure 6-5: The priority-sequence model

Source: Adapted from Morgan (1998:368)

Quantitative data collection, as the principal phase of the explanatory sequel design, and the complementary qualitative data collection phase, aimed at building on the results of the quantitative phase, will be further elaborated on. In this regard, the study adopted a specific sampling design process.

6.7.4 Study sampling design process and data structures

The study adopted and selectively applied the generic six steps of the sampling design process as suggested by Malhotra *et al.* (2017:414) and depicted in Figure 6-6. The study consisted of two separate study populations (active retail customers and retail management/trainers), where the populations represented the collection of all elements of interest to the study of customer experience in South African retail stores (Malhotra *et al.*, 2017:160). To make inferences from and answer research questions about the population's data was collected from the populations through a specific sampling plan applicable to the quantitative and qualitative phases of the study (Malhotra *et al.*, 2017:38).

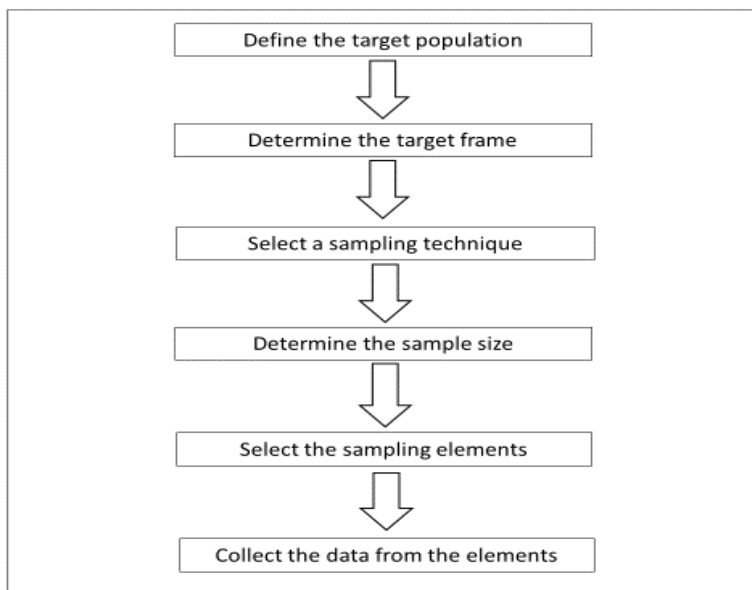


Figure 6-6: The sampling design process

Source: Adapted from Malhotra *et al.* (2017:414) & Iacobucci & Churchill (2005:283)

In following the accepted research design methodology raw data was collected, and data structures were created that describe the existing characteristics of the defined target market (Shiu *et al.*, 2009:62). The aim of data collection and structures was to obtain accurate and valid representation of the constructs that are relevant to the research topic. Also, to determine the extent of differences in the needs, perceptions, attitudes, and characteristics of subgroups to

guide the interpretation of data structures in multivariate data analyses (Malhotra *et al.*, 2017:72).

The mixed-methods methodology attempted to propose and confirm a framework of customer-centric service system constructs (12Es) to be deployed in retail stores. Furthermore, propose an appropriate customer experience flow by anchoring the service system constructs into a self-correcting sequential continuum and examine the relationship between each construct in the proposed flow and ensuing customer experience (Voss & Zomerdijk, 2007:11).

6.8 QUANTITATIVE STUDY DESIGN

The quantitative study, as indicated in Figure 6-4, aimed to quantify, affect measurement, and apply statistical analysis to quantitative data to confirm the conceptual customer experience management framework, establish its value in practice, and contribute to theory (Malhotra *et al.*, 2007:150; Schumacker & Lomax, 2004:5). In particular, to assess how “the individual effect of each component should provide novel guidance regarding how experiences could be designed for more favourable service evaluations and increased levels of customer store loyalty” (Alan *et al.*, 2016:717).

In considering quantitative research designs Malhotra *et al.* (2017:60) identify a choice of two routes: an exploratory or conclusive design. An exploratory research design is “characterised by a flexible and evolving approach to understanding marketing phenomena that are inherently difficult to measure” (Malhotra *et al.*, 2017:69). These researchers define a conclusive research design as being “characterised by the measurement of clearly defined marketing phenomena” (Malhotra *et al.*, 2017:69). The core differences between these two designs are set out in Table 6-5.

In considering the study’s objectives and the characteristics of the two quantitative designs, as listed in Table 6-5, the conclusive research design was chosen as the most fitting design for this study. This study is characterised by measuring clearly defined marketing phenomena, examining relationships through a formal and structured process where the information is clearly defined. The “sample is large and aims to be representative” and the results “can be used in their own right”, but “may feed into exploratory research” and “may set a context to exploratory findings” (Malhotra *et al.*, 2017:70).

Table 6-5: Differences between exploratory and conclusive designs

	Exploratory	Conclusive
Objectives	• To provide insights and understanding of the nature of marketing phenomena • To understand	• To test specific hypotheses and examine Relationships • To measure
Characteristics	• Information needed may be loosely defined • Research process is flexible, unstructured and may evolve • Samples are small • Data analysis can be qualitative or quantitative	• Information needed is clearly defined • Research process is formal and structured • Sample is large and aims to be representative • Data analysis is quantitative
Findings/results	• Can be used in their own right • May feed into conclusive research • May illuminate specific conclusive findings	• Can be used in their own right • May feed into exploratory research • May set a context to exploratory findings
Methods	• Expert surveys • Pilot surveys • Secondary data • Qualitative interviews • Unstructured observations • Quantitative exploratory multivariate methods	• Surveys • Secondary data • Databases • Panels • Structured observations • Experiments

Source: Adapted from Malhotra *et al.* (2017:70)

In this study's choice of a conclusive design, it is essential to consider Williams's (2007:66) three broad classifications associated with quantitative research: descriptive, experimental, and causal. In selecting the most appropriate research design, Malhotra *et al.* (2017:62) suggest two guiding perspectives: a marketing decision-making perspective and a research participant perspective.

Marketing decision-makers require information that is accurate, current, sufficient, available, and relevant (Malhotra *et al.*, 2017:62). From a research participant's perspective, the ease in relating to the research subject if the subject is simple to reflect upon can participant's anonymously share their attitudes, beliefs, behaviour, views, feelings, and intentions are all important factors to consider (Malhotra *et al.*, 2017:69). Both these perspectives play a role in the choice of quantitative research designs (Figure 6-7).

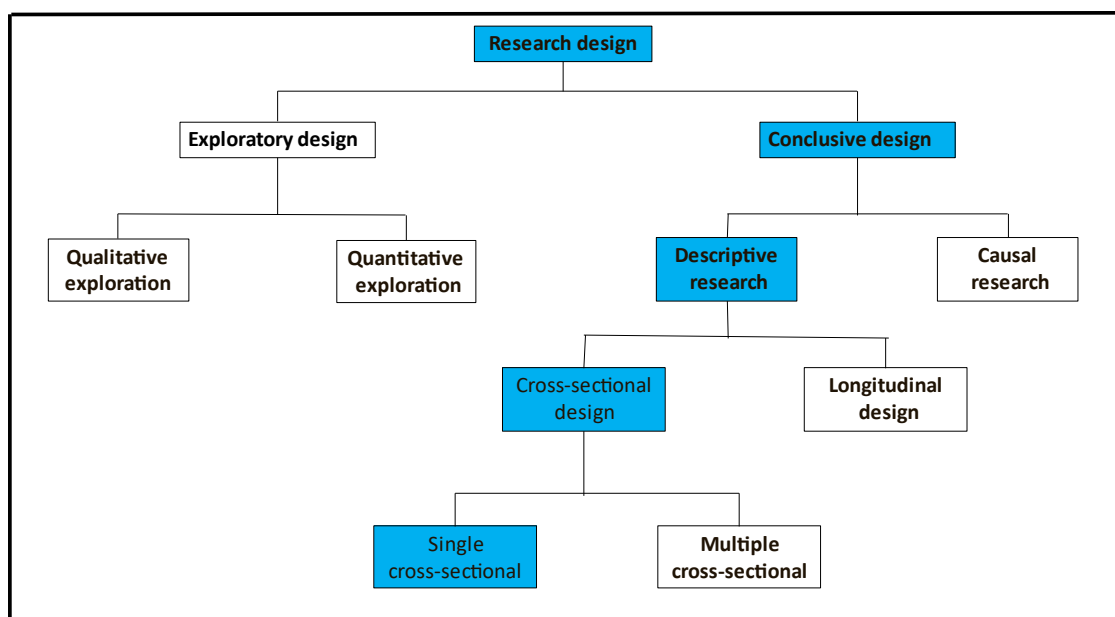


Figure 6-7: A classification of marketing research designs

Source: Malhotra *et al.* (2017:70)

The nature of this study suggests a preference towards a conclusive and structured descriptive research design approach (Figure 6-7). The latter is most suited for exploring the meaning of human experiences (Osborne, 1994:186), examining a situation as it exists and identifying constructs associated with a specific phenomenon (Williams, 2007:66).

6.8.1 Descriptive research method

Malhotra *et al.* (2017:73) state that the prior formulation of specific research questions and hypotheses characterises descriptive research. Thus, the information needed is clearly defined. As a result, descriptive research is pre-planned and structured. A descriptive research design specifies the methods for selecting the information sources and collecting data from those sources”.

Within the descriptive research method, Williams (2007:67) identifies four design options: correlational (examine the statistical correlation between two characteristics), developmental design (explore characteristic changes over time), observational studies (observe a particular aspect of human behaviour), and survey research (capturing of phenomena through representative sampling data through a closed-ended research instrument).

This study utilised the survey research method (Figure 6-7). A structured survey instrument was used to measure twelve construct variables “to make inferences from a sample to a population (Creswell & Miller 1997:35). The method “employs applications of the scientific method by

critically analysing and examining the source materials, by analysing and interpreting data, and by arriving at generalization and prediction” (Salaria, 2012:1).

The “time horizon” associated with this study’s choice of data collection techniques and analysis procedures, as described by Saunders *et al.*’s (2019:128) research onion (Figure 6-3), is a single cross-sectional procedure, as illustrated in Figure 6-7. A single cross-sectional design entails one sample of participants drawn “from the target population and information is obtained from this sample only once” opposed to a multiple cross-sectional procedure that entails “two or more samples of participants, and information from each sample is obtained only once (Malhotra *et al.*, 2017:74).

Structural equation modelling (SEM) was used to examine the structural relationships within the study’s conceptual management framework (Harrison, 2016:2158; Hox & Bechger, 1998:354).

6.8.2 Structural equation modelling (SEM)

As suggested by Org and Puteh (2017:17) the best method to examine the causal and effect relationship between a number of independent and dependent variables is through Structural Equation Modelling (SEM).

Structural equation modelling is defined by Malhotra *et al.* (2017:796) as “a procedure for estimating a series of dependence relationships among a set of concepts or constructs represented by multiple measured variables and incorporated into an integrated model”. Coolican (2016:551) states that SEM uses “a mixture of features to factor analysis and multiple regression” to examine the structural relationships between “measured variables (ones we can observe) and latent variables (ones which are assumed from statistical analysis of other variables)”.

Li and Wu (2007:33) state that “SEM takes a confirmatory (hypothesis testing) approach to the multivariate analysis of a structural theory” where the “intervariable relations within the theory is specified a priori” and the goal is “to determine whether a hypothesized theoretical model is consistent with the data collected to reflect this theory”.

The SEM model consisted of two elements: “the measurement model and the structural model” (Malhotra *et al.*, 2017:800). The measurement model exemplified the theory as discussed in Chapters 2 to 5 that suggested the observed variables for each construct and permits the assessment of construct validity. The structural model showed “how the constructs are related to each other, often with multiple dependence relationships. It specifies whether a relationship exists or does not exist. Suppose a relationship is hypothesised by the theory. In that case, an

arrow is drawn” (Malhotra *et al.*, 2017:800). If the measurement model fit indices were acceptable, it justify the testing of the structural model (Civelek, 2018:9).

The SEM in this study is the result of a process described by Malhotra *et al.* (2017: 802) that included defining individual constructs, specifying the measurement model, assessing the reliability and validity of the measurement model, specifying the structural model, assessing structural model validity, and conclusions and recommendations if the structural model is valid.

The SEM was used to examine the structural relationship between customer experience and customer engagement and satisfaction and also measured customer re-patronage behaviour. In this study, customer experience is conceptualised by a “second-order multidimensional formative construct identified through structural relations” (Lin *et al.*, 2005:325). This conceptualisation is illustrated by the measurement model as depicted in Figure 6-8.

Hox and Bechger (1998:355) state that the origin of a SEM lies in path analysis and typically starts with a path diagram. The latter consists of rectangular boxes representing observed (measured) variables, ellipses representing latent (unmeasured) variables, and arrows showing casual relationships between variables. In Figure 6-8, the tail end of the single-headed arrow shows the variable that causes another variable at the point's end and represents regression coefficients (Hox & Bechger, 1998:355).

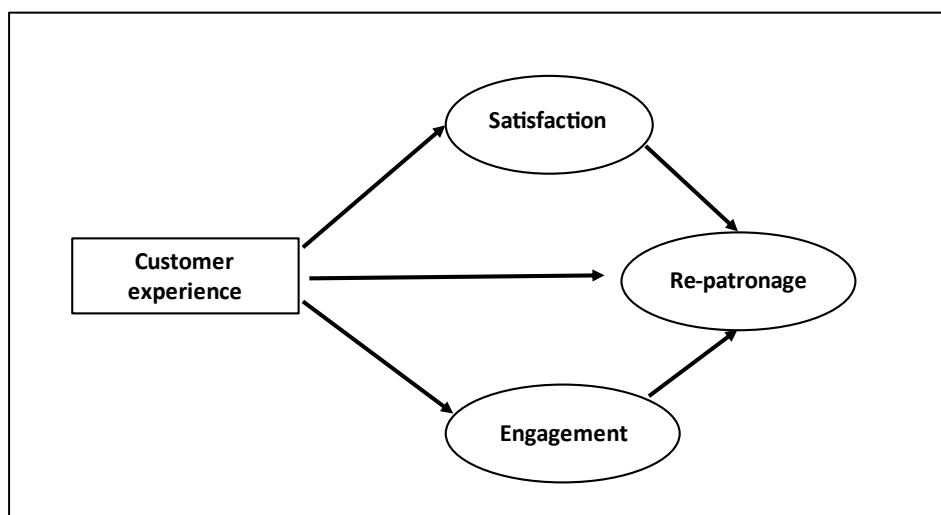


Figure 6-8: SEM measurement model

The SEM incorporated the measured factor, customer experience, that manifests in three (3) “consequence constructs”, namely satisfaction, engagement, and re-patronage (Lin *et al.*, 2005:325). The existence of formative environmental and behavioural cues can “influence consumers’ perceptions of service providers” and can impact shopping experiences (Baker *et al.*, 2002:122). Alan (2016:717) supports this view, who states that “experience-related and store-related cognitions regarding a consumption experience in a retail service context may exert direct effects on consumer loyalty”.

Schumacker and Lomax (2004:5) believe that the SEM technique is suited for confirming theoretical models, such as this study’s conceptual management framework, through quantitative methods as incorporated in this study’s research design. This opinion is supported by Malhotra *et al.* (2017:798), who state that the technique is confirmatory rather than exploratory. It determines whether a model is valid, “rather than using SEM to ‘find’ a suitable model” (Malhotra *et al.*, 2017:798).

The AMOS statistical package, designed by IBM Corporation, using maximum likelihood estimation (MLE) techniques was used in the SEM analysis to confirm this study’s customer experience management framework (Org & Puteh, 2017:18). Given some observed data, the MLE is a method of estimating the parameters of an assumed probability distribution.

6.8.3 Quantitative target population, sampling method and sample size

In discussing the epistemology of numbers, Adler and Adler in Baker and Edwards (2012:8) comment that “quantitative researchers capture a shallow band of information from a wide swath of people and seek to objectively use their correlations to understand, predict, or influence what people do”. Quantitative studies are characterised by large populations and sampling sizes that enable and “secure statistically significant findings or, more broadly, to secure assurance that an observed pattern is not mere happenstance” (Miller cited by Baker & Edwards, 2012:31).

6.8.3.1 Target population

This study’s target population comprised more than six thousand South African Communication Service Providers (CSP) retail customers. This sample population consisted of various dedicated retail customer databases. These multiple databases were used to identify the study’s sample frame. Although the size of the total South African retail customer population could not be estimated accurately, a sample frame of 6 650 active retail customers was selected (Anderson *et al.*, 2015:314).

The sample frame of active retail customers represented only those South African retail customers who transacted with a South African Communication Service Providers (CSP) retail entity twelve (12) months before the launch of the quantitative study. Coolican (2016:43) refers to a sample frame as a technical term for sampling the population from which we draw the sample, which is more specific than “the vague term ‘population’ and can also be referred to as the target population”.

The various dedicated retail customer databases comprised several repositories, including general retail consumer databases, anonymised databases, businesses, email lists, and SMS campaign databases. The researcher deemed the general retail consumer database the primary and the email and SMS campaign databases secondary sample population databases for study purposes.

6.8.3.2 Sampling method and sample size

Active retail customers from the general retail consumer target population were sampled through a non-probable judgmental or purposive sampling method.

Le Roux (2011:158) states that the non-probability sampling method consists of an array of “techniques where the probability of selecting each sampling unit is unknown”. The selection of sampling units relies on the researcher's discretion and is regarded as a subjective sampling approach as stated by Cooper and Schindler (2006:455). As illustrated in Figure 6.9, non-probability sampling techniques are suitable for concept tests, package tests and testing of management frameworks (Malhotra *et al.*, 2017:434).

Purposive or judgmental sampling, a form of convenience sampling, was used to select the sample units. This sampling method enabled the researcher to use personal expertise and judgment in choosing the most appropriate retail consumer database from a portfolio of databases. Studies suggest that purposive sampling strategies “lead to representative samples where a sample is considered representative when either sample characteristics or inferences from the sample approximate population values” (Van Hoeven *et al.*, 2015:2). This method of sampling is inexpensive, convenient, and quick (Malhotra *et al.*, 2017:421).

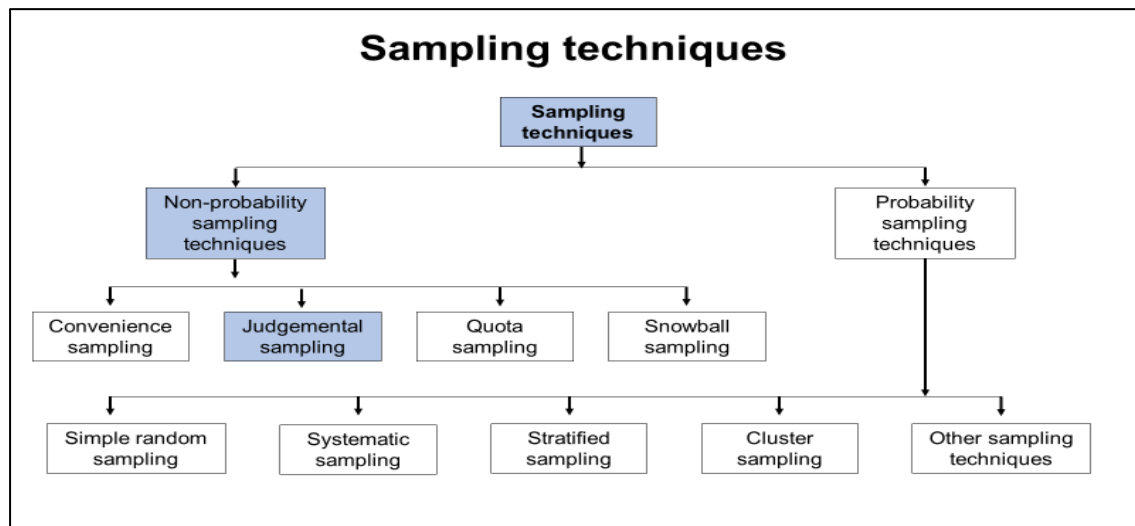


Figure 6-9: Sampling techniques

Source: Malhotra *et al.* (2017:419)

With an unknown population size and unknown population proportion the Cochran Formula was used to calculate the sample size (Uakarn *et al.*, 2021:79). The judgemental sampling technique with a 95% confidence level (z) and 5% degree of accuracy (e) was applied to the Cochran Formula ($n = z^2 / 4e^2$) resulting in a required sample (n) of 385 active retail customers.

The quantitative questionnaires were emailed to sample frame active retail customers included in the retail consumer target population repository. The first iteration of mailings resulted in 128 returned questionnaires, which increased to 305 completed questionnaires after two weeks. Email reminders were launched after seven working days to the sample frame, resulting in a gradual increase in returned questionnaires. In Week 5 of the survey, a total of 407 fully completed questionnaires were returned, and the survey was formally closed.

6.8.4 Quantitative study instruments and data collection

The research instruments selected for this study included the survey method through online questionnaires for the quantitative phase. In using the survey method the “characteristics, self-reported and observed behaviour, awareness of programs, attitudes or opinions, and needs” of the target population of active retail customers were obtained and analysed (Kabir, 2016:244).

The decision to use online questionnaires, as the preferred survey method for the quantitative study, was based on it being cost effective, convenient, time effective, and easier to administer. It also enhanced the ability to contact research subjects, provided more effective coding and storing of collected data (Boyer *et al.*, 2002:371; Fielding *et al.*, 2016:58).

The online self-administered quantitative questionnaire survey, in which the respondents self-select their responses, was aimed at the active South African Communication Service Providers (CSP) retail store customer base (Saunders *et al.*, 2019:146). The survey was conducted within the requirements of the South African *Protection of Personal Information Act* 4 of 2013 (POPI Act).

The web-based survey was hosted on an online survey server. Invitations to participate in the study were announced on email and WhatsApp platforms. Email technology was used to forward a link directing respondents to the website where the questionnaire was located. This approach was supplemented by WhatsApp technology to communicate the link to the target population base as and when required.

The questionnaire consisted of scaled structured exploratory, descriptive, and evaluative questions that were close ended in design (Mouton, 2001:4). It also included screening, demographic, and psychographic questions/statements. The questionnaire comprised a minimum of three statements for each of the twelve study constructs (12Es).

The questionnaire was compiled to confirm, expand, quantify/qualify, and test the appropriateness of the twelve key system constructs of the conceptual management framework (Malhotra *et al.*, 2007:156). Respondents were requested to rate statements about the proposed twelve key system constructs and its proficiency to influence customer behaviour and experiences at the retail shop level (Le Roux, 2011:12).

Respondents were asked to select their opinion about a specific statement best. A 5-point Likert scale was used to express an opinion, where 1 indicated strongly disagree, and 5 strongly agree with the statement.

Questionnaires contained an introduction page explaining the purpose of the study, ethical considerations, a participant consent portion, completion instructions, and detailed questions/statements to be answered.

The questionnaire for active customers was divided into three sections:

- The first section (Section A) tested the twelve proposed customer experience journey constructs and obtained customer evaluation, input and feedback on the construct's relevancy, efficacy, and acceptability.

- The second section (Section B) tested the impact of the application of the twelve constructs on customer experiences and its impact on customer engagement and satisfaction and on customer re-patronage.
- The third section (Section C) comprised the demographic particulars of the respondents and comprised gender, age, level of education, home language, profession, and geographical location.

The invitations to participate in the study resulted in 407 completed questionnaires accessed from the required sample of 385. As the number of respondents (active retail customers) approached during the invitation stage was unknown, the online response rate was unavailable (Lin *et al.*, 2005:326). The completed questionnaires were collated and tabulated, and the results were recorded in Microsoft Excel spreadsheet format for analysis.

6.8.5 Quantitative data analysis

Quantitative data analysis is a process of converting raw data into meaningful information through the processing and manipulation of raw data (Render *et al.*, 2016:20). The process is associated with reducing data into numeric values (Creswell 2009:217). It is furthermore associated with techniques using graphs, statistics, and tables to explain relationships between variables (Creswell 2014:32; Saunders *et al.*, 2016:496).

Anderson *et al.* (2015:5) defined a variable as a “characteristic of interest” for entities or elements on which data are collected. Creswell (2009:239) refers to a variable as “a characteristic or attribute of an individual or an organisation that can be measured or observed and varies among the people or organisation being studied. A variable typically will vary in two or more categories or on a continuum of scores, and it can be measured”.

Objectivity and a systematic approach play an important role in data analysis (Malhotra *et al.* 2011:256) and can be aided by applying quantitative analysis software. Software packages used in the quantitative analysis include POM-QM for Windows, SAS, IBM SPSS and Statview (Render *et al.*, 2016:28).

The IBM SPSS statistical software was used to analyse the data in this study. IBM SPSS is the preferred data analytical software based on the study’s objectives and the ability to perform both parametric and non-parametric comparison analyses. It also permits the researcher to check the tests’ assumptions, such as the normality test and outlier’s test. Besides that, this statistical package enables a frequency analysis to be perfectly conducted (Ong & Puteh 2017:18).

Malhotra *et al.* (2017:529) state that before quantitative data can be analysed, it must be “converted into a form suitable for analysis”. This process should be preceded by preliminary checks of the questionnaire for completeness and quality, followed by more thorough editing “to identify illegible, incomplete, inconsistent or ambiguous responses” (Malhotra *et al.*, 2017:552). Anderson *et al.* (2015:14) stress the importance of care in collecting and recording of data to ensure reliability and “valuable decision-making information”.

Editing should be followed by a process of coding comprising the assignment of a numeric or alphanumeric code to “represent a specific response to a specific question along with the column position or field that code will occupy” (Malhotra *et al.*, 2017:552). This study captured and coded the quantitative data from the survey questionnaires into Excel spreadsheets.

The following statistical techniques were used in this study:

- Frequency tables are a descriptive tool to provide more details on target group demographics and the basic results of each question in the questionnaires.
- Frequency tables to report on the specific results of questions of each customer group’s response to a certain service construct. Only questions with statistically significant results were reported.
- Structural equation modelling (SEM) combines factor analysis and regression analysis to examine the structural relationship between the study’s conceptual management framework’s measured variables and latent constructs.
- Reliability tests, including the Cronbach-alpha coefficients, determined the internal consistency of the sample groups’ results.
- The descriptive of the identified constructs, i.e., the factor scores.
- Differences between groups construct scores to be examined using independent t-tests (p-values) and effect sizes (d-values). An analysis of variance (ANOVA) was used to analyse the difference between the means of more than two groups.

Descriptive statistical analyses were conducted, followed by a factor analysis posited by Malhotra *et al.* (2017:548) as “the major technique for examining variable interdependence”. Malhotra *et al.* (2017:219) regard factor analysis as “to discover the important underlying factors or dimensions that encapsulate a particular form of behaviour”.

6.8.6 Quantitative data findings

Anderson *et al.* (2015:8) indicate that data can be classified as categorical or as quantitative. Categorical data refer to data that can be grouped by specific categories (Hellerstein, 2008:4) and use “either the nominal or ordinal scale of measure” (Anderson *et al.*, 2015:8). Quantitative data uses “numeric values to indicate how much or how many... and are obtained using either the interval or ratio scale of measurement” (Anderson *et al.*, 2015:8).

Following a process of editing and coding Hellerstein (2008:24) states that “frequency statistics can be important not only for quantitative attributes, but for categorical attributes that do not have an inherent numerical interpretation. For categorical attributes, the “names” of the data values are relevant, but the ordering of values is not. For categorical data, the statistical distribution of values is important in terms of the frequencies of occurrence of each value”.

This study presents its quantitative findings through frequencies, descriptive statistics, factor analysis, reliability, and one-way analysis of variance (ANOVAs). These are discussed in the next subsection.

6.8.6.1 Frequencies

A frequency distribution is defined by Anderson *et al.* (2015:38) as “a tabular summary of data showing the number (frequency) of observations in each of several nonoverlapping categories or classes. Malhotra *et al.* (2017:562) described it as a convenient way of looking at different variable values as it is easy to read and provides basic information. The researchers posit that the most commonly used statistics associated with frequencies are measures of location (mean, mode and median), measures of variability (range, interquartile range, variance, standard deviation, and coefficient of variation) and measures of shape (skewness and kurtosis) (Malhotra *et al.*, 2017:562). This study makes extensive use of measures of location and measures of variability.

The mean is one of the most important measures of location indicating the centre location of data (Anderson *et al.*, 2015:108). Hellerstein (2008:6) refers to “some typical value” at the “centre, or core, of a set of values that may or may not appear in the set. The most familiar centre metric is the mean (average) of the values, which typically is not one of the values in the set”. Average is defined by Malhotra *et al.* (2017:562) as the value “obtained by summing all elements in a set and dividing by the number of elements”.

The other measures of location or central tendency are the mode and the median. Malhotra *et al.* (2017:562) describe the mode as “the value that occurs with the most frequency in a

sample distribution and is a good measure of location when the variable is inherently categorical or has otherwise been grouped into categories". The median is described as the "value above which half of the values fall and below which half of the values fall. The median of a sample is the middle value when the data are arranged in ascending or descending order. Suppose the number of data points is even. In that case, the median is usually estimated as the midpoint between the two middle values by adding the two middle values and dividing their sum by 2. The median is the 50th percentile. The median is an appropriate measure of central tendency for ordinal data" (Malhotra *et al.*, 2017:562).

In addition to measures of location, Anderson *et al.* (2015:125) suggest that "it is often desirable to consider measures of variability or dispersion". The standard deviation is defined as a measure of variability "computed by taking the positive square of the variance" where the variance "is based on the squared deviation of the data values the mean" (Anderson *et al.*, 2015:164). Another measure of variability associated with frequency distribution tables is the coefficient of variation, a measure of relative variability computed by dividing the standard deviation by the mean and multiplying it by 100 (Anderson *et al.*, 2015:164).

Malhotra *et al.* (2017:562) surmise that although frequency tables are "easy to read and provide basic information" the information "may be too detailed, and the researcher must summarise it by the use of descriptive statistics".

6.8.6.2 Descriptive statistics

Descriptive statistics "consists of data that are summarised and presented in a tabular, graphical, or numerical form that is easy for the reader to understand" (Anderson *et al.*, 2015:14). Summarising data into a simpler form enables decision-makers to "assess specific populations in a more manageable form" (Kaur *et al.*, 2018:60). It also assists in describing characteristics of collected data, provide a more comprehensive picture of the studied phenomenon, and enable reporting on research questions (Mokoena, 2020:76).

Two main categories exist for summarizing and examining data from research studies. Nick (2007:33) identifies the two categories as descriptive and inferential statistics. Descriptive statistics concisely display data, enabling the uncovering of patterns within the data and estimating characteristics of a population (Nick, 2007:33). Larson (2006:76) refers to descriptive statistics as "numbers that characterize features of specific data" being presented in tables and graphs. In addition, descriptive statistics "describe the relationship between variables in a sample and represent a first step before making inferential statistical comparisons. It includes

types of variables (nominal, ordinal, interval, and ratio) as well as measures of frequency, central tendency, dispersion/variation, and position” (Kaur *et al.*, 2018:60).

The frequency and proportion of categorical data, also referred to as categorical variables, such as gender, age, level of education, language, profession and geographic location level of seniority and geographic location are presented usually in frequency tables (Nick, 2004:33). Descriptive statistics are also applied to continuous variables, including responses to research questions, and included descriptive statistic tables reflecting means, standard deviations, and ranges (Creswell, 2014:225).

Quantitative data collected from respondents was analysed in descriptive statistics with the IBM SPSS software. The interpretation scale for the mean score was based on the scales (Fong *et al.*, 2018:38). The scale was divided into five categories ranging from very low to very high, as shown in Table 6.6.

Table 6-6: Likert scale descriptions and mean score interpretation scale

Likert scale	Likert scale description	Mean score range	Mean score verbal interpretation
1	Strongly disagree	1.00 – 1.89	Not acceptable
2	Disagree	1.90 – 2.69	Fairly acceptable
3	Neutral	2.70 – 3.49	Moderately acceptable
4	Agree	3.50 – 4.29	Acceptable
5	Strongly agree	4.30 – 5.00	Highly acceptable

Source: Adapted from Fong *et al.*, 2018:38

6.8.6.3 Factor Analysis

Factor analysis is described by Williams *et al.* (2010:2) as a “multivariate statistical procedure” with many uses. Taherdoost *et al.* (2022:375) identify factor analysis as a methodology to reduce large numbers of variables or factors “into a smaller set”. Williams *et al.* (2010:2) elaborate on this statement and indicate that it also “establishes underlying dimensions between measured variables and latent constructs, thereby allowing the formation and refinement of theory”. It also “provides construct validity evidence of self-reporting scales” (Williams *et al.*, 2010:2).

As a statistical technique, factor analysis has limitations and the methodology “is not without controversy or criticism” (Williams *et al.*, 2010:3). Limitations of factor analysis, as cited by Yong and Pearce (2013:81), include factors not being correctly named and not reflective of the variables assigned to factors. Split loading (variable loading onto more than one factor), which

impedes interpretations of variables and large study samples to ensure the reliability of factors, is also cited as a limitation of factor analysis methodologies. Williams *et al.* (2010:3) add to the limitations by referring to the subjectiveness of results determined by researchers and researchers' decisions about the "number of factors and rotational scheme" being based on "pragmatic rather than theoretical criteria".

The two main factor analysis techniques, as identified by Williams *et al.* (2010:2) and Yong and Pearce (2013:79), are Exploratory Factor Analysis (EFA) and Confirmatory Factor Analysis (CFA). Williams *et al.* (2010:2) state that CFA is applied to test a proposed theory and utilizes "path analysis diagrams to represent variables and factors, whereas EFA tries to uncover complex patterns by exploring the dataset and testing predictions".

Yong and Pearce (2013:79) confirm Williams *et al.*'s notion that CFA focuses on confirming hypothesis but add that it "has assumptions and expectations based on priori theory regarding the number of factors, and which factor theories or models best fit". The researchers regard EFA to be "heuristic" of nature as "it allows the researcher to explore the main dimensions to *generate* a theory, or model from a relatively large set of latent constructs often represented by a set of items" (Yong & Pearce, 2013:79).

The core differences between the two main factor analysis techniques, CFA and EFA, can be simplified by describing that an EFA proposes to "explore or discover some underlying but unknown structure," whereas a CFA proposes to "examine or test an assumed structure" (Ghauri & Gronhaug, 2002:165). Though there are distinguishing differences between the two techniques, Malhotra *et al.* (2017:710,730) choose to oversimplify the term factor analysis by stating that "factor analysis is also called exploratory factor analysis (EFA)" and primarily deals with CFA in the context of structural equation modelling (Malhotra *et al.*, 2017:798).

Malhotra *et al.* (2017:814) believe that in applying an EFA, the data reveals the underlying structure, and thus EFA "does not require specification". EFA results can be useful in developing a theory that leads to a conceptual measurement model that can be tested using CFA. When SEM is used to test a structural theory, the analysis is analogous to performing factor analysis and a series of multiple regression analyses in one step".

6.8.6.4 Exploratory factor analysis

An Exploratory factor analysis primarily enables researchers to reduce the number of variables but also assists researchers in achieving most of the following objectives as identified by Williams *et al.* (2010:2):

- “Examine the structure or relationship between variables
- Detection and assessment of unidimensionality of a theoretical construct
- Evaluates the construct validity of a scale, test, or instrument
- Development of parsimonious (simple) analysis and interpretation
- Addresses multicollinearity (two or more variables that are correlated)
- Used to develop theoretical constructs
- Used to prove/disprove proposed theories” (Williams *et al.*, 2010:2)

An exploratory factor analysis (EFA) can be conducted according to the protocol associated with “an empirically supported systematic approach that simplifies the many guidelines and options associated with completing EFA”, as proposed by Williams *et al.* (2010:1). A precursor to Williams *et al.*, suggested systematic approach protocol can be found in research by Fabrigar *et al.* (1999:273) and Pohlmann (2004:20) who proposes that researchers should consider five methodological issues when conducting a factor analysis.

A researcher’s decision to embark on an EFA can be guided by five methodological issues identified by Fabrigar *et al.* (1999:273): “First, they must decide what variables to include in the study and the size and nature of the sample on which the study will be based. Second, a researcher must determine if EFA is the most appropriate analysis given the research project’s goals. Third, assuming that EFA is appropriate, a specific procedure must be selected to fit the model to the data. Fourth, the researcher must decide how many factors should be included in the model. Finally, it is usually necessary for a researcher to select a method for rotating the initial factor-analytic solution to a final solution that can be more readily interpreted”.

Fabrigar *et al.* and Pohlmann’s (2004) methodological issues find substance a five-step sequential and linear EFA protocol proposed Williams *et al.* (2010:4). The protocol commences with the establishment of data suitability for factor analysis, followed by how the factors will be extracted, then the decision on “what criteria will assist in determining factor extraction”, the selection of a rotational method and lastly “interpretation and labelling” (Williams *et al.*, 2010:4).

6.8.6.4.1 Assessing data suitability

Adequate sample size is an essential requirement for factor analysis, but the literature is not clear on required sizes and cites varying options and several guiding rules of thumb that can be

applied by researchers (Williams *et al.*, 2010:4). Hogarty *et al.* (2005:203) agree with Williams *et al.* on the importance of sample sizes and state that the influence thereof “on the variability of factor loadings is critical as the magnitude of factor loadings is frequently used as a criterion to determine which variables are substantially related to a given factor and thus should be included in the interpretation of a factor”.

Schmitt (2011:304) also emphasizes the importance of sample sizes as it is determinative to “accurate parameter estimates and adequate power, a factor model and estimation method, a method for determining the number of factors and evaluating model fit, and a rotation criterion. Hogarty *et al.* (2005:203) conclude that the lack of agreement and the varying options and guidelines “have not served researchers well” as it fails to consider “many of the complex dynamics of a factor analysis”.

General guides to sample sizes by researchers such as Tabachnick and Fidell (1996:640) suggest a sample size of at least 300. Williams *et al.* (2010:4), citing Hair *et al.*, suggest sample sizes of at least 100. In citing Comrey and Lee, Henson and Roberts (2006:401) refer to a rule of thumb that can guide sample size and indicate a sample size “of 100 as poor, 200 as fair, 300 as good, 500 as very good, and 1000 or more as excellent” sample sizes. Henson and Roberts (2006:402), in considering the different rules of thumb presented in factor analysis literature, comment that it “is not uncommon to find such rules of thumb in the factor analytic literature; it is less common, though, to find consistency in recommendations”.

In furthering the literature debate about sample sizes, Henson and Roberts (2006:402) suggest that “the adequacy of a sample size depends in large part on the features of the obtained data”. In this regard, Henson and Roberts cited MacCallum *et al.*, who suggest that with high communalities (greater than 0.60) and each factor is defined by several items, sample sizes can be relatively small”. Williams *et al.* (2010:5) believe that the Kaiser-Meyer-Olkin Measure of Sampling Adequacy (KMO) and Bartlett's Test of Sphericity are appropriate tests to assess the suitability of respondent data for factor analysis. The researchers state that KMO index ranges between 0 and 1. Although 0.50 is considered to be suitable for factor analysis, a KMO value of 0.70 or higher is more satisfactory (Williams *et al.* (2010:5). The KMO index, in particular, is recommended when the cases-to-variable ratio is less than 1:5. The Bartlett's Test of Sphericity should be significant ($p < .05$) for factor analysis to be suitable”.

6.8.6.4.2 Factor extraction

After adopting an EFA approach, researchers choose a model-fitting procedure to fit the common factor model to the data (Fabrigar *et al.*, 1999:277). Factor extraction is defined by Fabrigar *et al.* (1999:277) as a “model fitting method”.

Henson and Roberts (2006:397) state that factor extraction aims to “remove variance common to sets of variables from the original matrix of association. After the first factor (or common variance for a set of variables) has been extracted, a residual matrix remains. A second factor, orthogonal to the first, is then extracted from the residual matrix to explain as much of the remaining variance among the variables as possible. The process continues until factors can no longer explain noteworthy variance”.

Multiple ways exist in literature to extract factors (Henson & Roberts, 2006:397; Williams *et al.*, 2010:5). The commonly used methods as identified by Williams *et al.* (2010:6) include Principal components analysis (PCA), Principal axis factoring (PAF), Maximum likelihood, Unweighted Least Squares, Generalised Least Squares, Alpha Factoring and Image Factoring with PCA and PAF the two mostly used methods (Henson & Roberts, 2006:397).

Henson and Roberts (2006:397) posit that PCA and PAF extraction are the most commonly used methods. Thompson, cited by Williams *et al.*, states that although analysts differ substantially on which of PCA or PAF methods to use, the “practical differences between the two are often insignificant, particularly when variables have high reliability or where there are 30 or more variables”. The default method in many statistical programs is PCA, specifically in EFA (Thompson cited in Williams *et al.*, 2010:6). The PCA is regarded as a descriptive rather than an inferential tool. Jolliffe and Cadima (2016:2) posit that as a descriptive tool, it needs no distributional assumptions and, as such, is an adaptive exploratory method which can be used on numerical data of various types.

Researchers are encouraged by Gaskin and Happell (2014:514) to “appreciate the differences between these models and choose the one that is most suitable for their work”. This study adopted the Principal Component Analysis (PCA) methodology.

6.8.6.4.3 Criteria for determining factor extraction

As Williams *et al.* (2010:6) stated, data extraction aims “to reduce a large number of items into factors”. Everitt and Hothorn (2011:142) stress the importance of the decision on how many factors are required “to give an adequate presentation of the observed covariances or correlations when fitting an exploratory factor analysis model”. Several extraction rules and

approaches exist to determine the number of factors to retain to “produce scale unidimensionality and simplify the factor solutions” (Williams *et al.*, 2010:6). These rules include Bartlett’s test, Kaiser’s eigenvalues greater than one rule, Cattell’s scree test, Velicer’s minimum average partial (MAP) rule, Horn’s parallel analysis, the Hull method, the cumulative percentage of variance extracted and Ruscio and Roche’s comparison data (CD). (Costello & Osborne, 2005:2; Fabrigar *et al.*, 1999:278; Gaskin & Happell, 2014:514; Malhotra *et al.*, 2017:717; Williams *et al.*, 2010:6).

Costello and Osborn (2005:7) advise that factor extraction should not be based on one criterion. Gaskin and Happell (2014:514), Hair *et al.* (cited by Williams *et al.*, 2010:6); Henson and Roberts (2006:399) and Thompson and Daniel (2011:200) agree with Costello and Osborn and suggest the concurrent use of multiple decision rules.

This study subscribed to using multiple decision rules by applying the Social Sciences (SPSS) for Windows’ Principal Components extraction method. The measures used in this study include determinants, communalities, total variance explained, and components extracted.

6.8.6.4.4 Selection of rotational method

Rotation techniques are applied to principal components analysis results to assist with interpretability (Everitt & Hothorn, 2011:146). As defined by Williams *et al.* (2010:6, 9), the objective of rotation is to simplify the factor structure of a group of items by maximising high item loadings and minimising low item loadings, “therefore producing a more interpretable and simplified solution”. The objective of factor rotation is thus to simplify and clarify the data structure (Costello & Osborne, 2005:3) and enable researchers to contemplate whether a variable relates to more than one factor (Williams *et al.*, 2010:9).

In simplifying an exploratory factor analysis through factor rotation, the overall structure of a solution will not alter, but only how the solution is described (Everitt & Hothorn, 2011:144). It is a process by which a solution is made more interpretable without changing its underlying mathematical properties” (Everitt & Hothorn, 2011:144).

Gaskin and Happell (2014:517) posit that at the most basic level, researchers have the choice of orthogonal (when factors are uncorrelated) or oblique (when factors are correlated) forms of rotation. Several methods exist to choose between the orthogonal (varimax or quartimax) or oblique rotation (oblimin or promax) options (Williams *et al.*, 2010:9).

In evaluating the advantages and disadvantages of each rotational method, Fabrigar *et al.* (1999:283) declare that given the advantages of oblique rotation over orthogonal rotation, there

is little justification for using orthogonal rotation as a general approach to achieving solutions. This is supported by Costello and Osborne (2005:3), who state that using orthogonal rotation results in a loss of valuable information if the factors are correlated, and oblique rotation should theoretically render a more accurate and reproducible solution.

This study preferred the oblique form of rotation as it provide a more accurate and realistic representation of how constructs are likely to be related to one another (Fabrigar *et al.*, 1999:282). Fabrigar *et al.* (1999:281) also comment that there is no single dominant oblique method, as all deliver satisfactory solutions. It represents “a family of rotations defined by different values of the delta parameter, which governs the obliqueness of the solution” (Fabrigar *et al.*, 1999:282), where the main objective is to “provide easier interpretation of results and produce a solution that is more parsimonious” (Williams *et al.*, 2010:9).

6.8.6.4.5 Interpretation and labelling

The European Society for Opinion and Marketing Research (in Malhotra *et al.*, 2017:7) states that the core of research is the systematic gathering of data and the interpretation of information through the application of statistical and analytical methods and techniques to gain insight or support decision-making, citing the). The interpretation of research data “should be context-specific, weighing the merits and potential unreliability of the study methodology against the potential real-world impact of small or large effects” (Ferguson, 2009:533).

Kerlinger (cited by Henson and Roberts, 2006:394) regards factor analysis as “one of the most powerful methods yet for reducing variable complexity to greater simplicity”. An objective with factor analysis is “to provide easier interpretation of results and produce a solution that is more parsimonious” (Williams & Osmond, 2010:9). With the emphasis on parsimonious solutions Henson and Roberts (2006:394) state that “researchers often strive to explain the most shared variance of measured variables using the fewest possible latent or synthetic variables. Such parsimonious solutions are considered generally to have greater external validity and, as such, are more likely to replicate”.

Pohlmann (2004:16), however, cautions researchers that factor analysis interpretation should not be confused with discovering an underlying structure for a set of variables. The researcher asserts that the mathematics of factor analysis does not warrant the interpretation. There is a fundamental indeterminacy in factor analysis. One cannot uniquely infer a correct factor structure. Instead, one must select parsimonious and meaningful structures from infinite possible structures.

The structured approach of quantitative studies and techniques enables researchers to apply more effective coding, analysis, and interpretation of research results (Malhotra *et al.*, 2017:187). Interpretation of factor analysis results requires the researcher to “isolate items with high loadings” by examining which variables are attributable to a factor explaining the majority of responses and providing a label, name or theme to such a factor (Williams *et al.*, 2010:9). Following the identification of factors Williams *et al.* (2010:9) indicate that the factors should then “be operationalised and descriptively labelled. these labels or constructs must reflect the theoretical and conceptual intent” (Williams *et al.*, 2010:9).

Researcher judgment plays a vital role in interpreting results (Henson and Roberts, 2006:396). Pohlmann (2004:16) states that it is “conceivable that two researchers who analyse the same data could select very different factor solutions”. Tabachnick and Fidell, cited by Henson and Roberts (2006:396), refer to variances in original data that can lead to differently defined factors as it depends “on the researcher’s assessment of its interpretability and scientific utility”.

The initial statement by Pohlman (2004:16) is supported and emphasised by Henson and Roberts (2006:396), who affirm that “in the presence of an infinite number of mathematically identical solutions, researchers are bound to differ regarding which is best”. In citing Tabachnick and Fidell Henson and Roberts (2006:396) refer to differences among researchers that cannot be resolved by appealing to objective criteria and that most “arguments over the best solution sometimes become vociferous”.

6.8.6.5 Reliability testing

This study’s quantitative questionnaire aimed to obtain relevant data most reliably to generalise the data to the stated study problem (Malhotra *et al.*, 2017:97; Taherdoost, 2016:28:). The consistency of the survey or questionnaire remains an essential and significant aspect of any research methodology (Taherdoost, 2016:28). In this regard, Middleton (2023) refers to reliability as obtaining the same result by using the same methods under the same circumstances. Golafshani (2003:599) makes this statement by indicating that if a researcher can replicate the results of a quantitative study, then it is a reliable study.

Malhotra *et al.* (2017:160) define reliability as “the extent to which a scale produces consistent results if repeated measurements are made on the characteristic”. In essence, these definitions refer to:

- A respondent completing the questionnaire on two different points in time should get the same score for each factor each time they complete the questionnaire, all other things being equal.
- Two respondents who are the same in terms of the factor measured by the questionnaire should both get the same scores for these constructs.

In discussing reliability Heale and Twycross (2005:67) refer to the attributes of reliability and identify the following three attributes:

- **Homogeneity** (or internal consistency) - The extent to which all the items on a scale measure one construct.
- **Stability** - The consistency of results using an instrument with repeated testing
- **Equivalence** - Consistency among responses of multiple users of an instrument or among alternate forms of an instrument.

The attributes identified by Heale and Twycross (2005), are supported by Golafshani (2003:598) (who cited Kirk and Miller) in stating that the types of reliability include consistency of measurement outcomes, stability of measurement over time and similarity of measurement within a specified period. The identified attributes suggest that reliability is a statement of accuracy with “philosophical underpinnings that suggest that the researcher is attempting to find proximal measures of the true scores that perfectly describe the phenomenon” (Straub *et al.*, 2004:36).

Quantitative study reliability can be assessed through the application of several techniques. Boudreau *et al.* (2001:5) and Straub *et al.* (2004:13) specify five generally recognised reliability techniques. These techniques are summarised in Table 6-7 and indicate the heuristics and pros and cons of each as specified by Straub *et al.* (2004:13). As indicated by Straub *et al.*’s table and supported by Heale and Twycross (2005:67), Lozano *et al.* (2008:73), Malhotra *et al.* (2017:360) and Taherdoost (2016:33) the Cronbach alpha test (Cronbach, 1951:297-334) is the most commonly used test to determine the internal consistency of an instrument. Boudreau (2001:7) indicates that 79% of studies assessing the reliability of their instruments used the standard coefficient of internal consistency, i.e., Cronbach alpha.

Table 6-7: Generally recognised reliability techniques

Reliability	Heuristic's/Techniques	Comments/Pros and Cons
Internal consistency	Cronbach alpha; correlations; SEM composite consistency estimates	Alpha assumes that scores for all items have the same range and meaning; if not true, adjustments can be made in the statistics; also, nonparametric correlations can be plugged into the formulation
Split half	Cronbach alpha; correlations	Different results may be obtained depending on how one splits the sample; if enough different splits are made, the results approximate internal consistency Cronbach's
Test-retest	Cronbach alpha; correlations; SEM estimates	Comparisons across time of an instrument
Alternative or equivalent forms	Cronbach alpha; correlations; SEM estimates	Comparisons across time and forms of an instrument
Inter-rater Reliability	Percentages; correlations; Cohen's Kappa	Transformation of correlations suggested

Source: Adapted from Straub *et al.* (2004:13)

The Cronbach coefficient varies from 0 to 1, and a value of 0.6 or less generally indicates unsatisfactory internal consistency reliability (Malhotra *et al.*, 2017:360). Straub *et al.* (2004:54) suggest a reliability value equal to or above 0.60 as acceptable. Taherdoost (2016:33) agrees with the Cronbach Alpha coefficient as the most commonly used internal consistency measure especially when a study uses Likert scales (citing Robinson). The researcher further states that “no absolute rules exist for internal consistencies. However, most agree on a minimum internal consistency coefficient of 0.70” (Taherdoost, 2016:33). This value is supported by Heale and Twycross (2015:67) in citing Korb (2012) who suggest a reliability score of 0.7 or higher as acceptable.

In considering the “no-absolute rules” declaration by Taherdoost and the different opinions of researchers regarding acceptable reliability values this study subscribes to the range of reliability values as suggested by Fong *et al.* (2018:38) citing Cooper and Schindler, Hinton *et al.* and Cohen, Manion and Morrison as illustrated in Table 6-8.

Table 6-8: Cronbach's Alpha cut-off points for reliability

Indicator	Cooper and Schindler (2003)	Hinton <i>et al.</i> (2004)	Cohen <i>et al.</i> (2007)	Kline (2000) cited by Tommasi <i>et al.</i> (2018)
Very high/excellent	$\alpha \geq 0.9$	$\alpha \geq 0.9$		
High/Good	$0.7 \leq \alpha < 0.9$	$0.7 \leq \alpha < 0.9$	$0.7 \leq \alpha < 0.8$	
Moderate/acceptable	$0.6 \leq \alpha < 0.7$	$0.5 \leq \alpha < 0.7$	$0.6 \leq \alpha < 0.7$	$0.6 \leq \alpha < 0.7$
Poor/Low	$0.5 \leq \alpha < 0.6$	$\alpha < 0.5$	$\alpha < 0.6$	$0.5 \leq \alpha < 0.6$
Unacceptable/Very low	$\alpha < 0.5$			$\alpha < 0.5$

Source: Adapted from Fong *et al.* (2018:38)

6.8.6.6 Comparison of means using t-tests

According to Ross and Willson (2017:13), a *t*-test is a parametric test to establish whether two groups have comparable or different mean scores. Swanson and Holton (2005:39) describe the *t*-test as a statistical tool to “indicate whether the difference is likely to be a “real” difference”. Malhotra *et al.* (2017:581) state that the application of parametric or nonparametric tests is “based on the measurement scale of the variables involved”. The application of a parametric test assumes that “the variables of interest are measured on at least an interval scale” (Malhotra *et al.*, 2017:581). Nonparametric tests assume the variables are measured on a nominal or ordinal scale (Malhotra *et al.*, 2017:581).

This quantitative study utilised Likert scale data. Boone and Boone (2012:3) describe Likert scale data as “a composite score (sum or mean) from four or more type Likert-type items”. They suggest that the composite score for Likert scales “should be analysed at the interval measurement scale”. These researchers state that “descriptive statistics recommended for interval scale items include the mean for central tendency and standard deviations for variability” and suggest that data analysis procedures appropriate for interval scale items “would include the Pearson's *r*, *t*-test, ANOVA, and regression procedures” (Boone & Boone, 2012:3).

Norman (2010:631) posits that parametric analysis methods, such as *t*-tests, “can be used with Likert data, with small sample sizes, with unequal variances, and with non-normal distributions, with no fear of coming to the wrong conclusion”. The writer suggests that “these findings are consistent with empirical literature dating back nearly 80 years” (Norman, 2010:631). This is supported by Simsek (2023:122), who examined the statistical power of selected tests regarding sample size, group size ratio, and effect size for Likert-item analysis. The results of this study

“implies that parametric tests such as Student's t can be used to analyse Likert-type data under certain conditions. For the small effect size, it was found that the selected statistical tests could achieve the desired statistical power with a sample size of 400”.

Gaur and Gaur (cited by Le Roux, 2011:68) and Malhotra *et al.* (2017:547) allude to three types of t-tests consisting of 1) the One sample (comparing the mean of a single sample with the populations' mean), 2) Independent sample (to detect differences between the means of two independent groups), and the 3) Paired sample t-test (same sample mean values to be analysed at two different times, or if groups are related or connected in some way). This study used the independent t-test, where the term *independent* indicates that the two compared groups are not related or connected (Ross & Wilson, 2017:13)

6.8.6.7 One-way analysis of variance (ANOVAs)

Analysis of variance (ANOVA) determines if survey or experiment results are significant (Glen, 2023). Malhotra *et al.* (2017:604) describe ANOVA as a “statistical technique for examining the differences among means for two or more populations”. This description is confirmed by Bevans (2022), stating that ANOVA is a statistical test used to analyse the difference between the means of more than two groups.

In explaining ANOVA in more detail Malhotra *et al.* (2017:604) state that the technique is used “for examining the differences in the mean values of the dependent variable associated with the effect of the controlled independent variables, after taking into account the influence of the uncontrolled independent variables. In its simplest form, ANOVA must have a metric-dependent variable (measured using an interval or ratio scale). There must also be one or more independent variables. The independent variables must all be categorical (non-metric)” and they are referred to as factors (Malhotra *et al.* (2017:604).

Coolican (1994:327) accentuates that an ANOVA test “involves comparing the variance of the sample means (between groups variation) with the variance within groups (an average of the variances within each sample). Suppose means differ among themselves far more than they differ within groups. In that case, the F-ratio will be higher than 1 to a significant extent assessed from tables using the df associated with the 'effect' (the IV) and the df associated with the 'error' (the residual variance within groups)”.

ANOVA results directly compare the amount by which samples vary and the amount each sample varies around its mean (Coolican, 1994:329). These variations occur for two reasons: 1) because the groups differ, and 2) because respondents differ within each group. In ANOVA,

all the data values are divided into the variation between the conditions and the “residual variation - attributable to general random error within each condition. If the means vary a lot, relative to the remaining variation, then it is more likely that there is a real difference between conditions” (Coolican, 1994:328).

This study utilises a one-way analysis of variance (one-way ANOVA). After all, only one factor refers to a categorical independent variable in the ANOVA (Malhotra *et al.*, 2017:604). The procedure for conducting a one-way ANOVA involves “identifying the dependent and independent variables, decomposing the total variation, measuring the effects, testing significance and interpreting the results” (Malhotra *et al.*, 2017:606).

Statistical results of the ANOVA technique are typically reflected in a table summarising the ANOVA computations. The table consists of “columns showing the source of variation, the sum of squares, the degree of freedom, the mean square, the F value(s), and the p-value(s)” (Anderson *et al.*, 2015:595). Mokoena (2020:79), in citing Pallant (2020), posits that “ANOVAs are presented using descriptives tables, the Levene’s test of homogeneity of variance (the Sig value), P value, Welch, and effect size. The descriptives table contains the mean and standard deviation”. Mokoena (2020:79), in further citing Pallant, argues that “if the Sig value is less than or equal to 0.05 there is a significant difference somewhere among on your dependent variable the mean scores.”

The analyses of ANOVA data obtained from random sampling are different from convenience sampling. Though p-values and interpretation are important to random sampling studies, it only get reported for completeness in convenient sampling studies and is not interpreted (Ellis & Steyn, 2003:51; Thompson & Daniel, 1996:202). As a replacement for p-values, convenient sampling studies use ‘effect size’, which is “a measure of practical significance and can be understood as a large enough effect to be important in practice and is described for differences in Means” (Ellis & Steyn, 2003:51).

Effect size is regarded by Sullivan and Feinn (2012:279) as “the main finding of a quantitative study”. They state that a *P* value informs the reader whether an effect exists but will not reveal the size of the effect. They conclude that “in reporting and interpreting studies, both the substantive significance (effect size) and statistical significance (*P* value) are essential results to be reported” (Sullivan & Feinn, 2012:279).

McLeod (2019) refers to effect size as a “quantitative measure of the magnitude of the experimental effect. The larger the effect size, the stronger the relationship between two variables. It can be argued that emphasizing the size of the effect promotes a more scientific

approach, as unlike significance tests, the effect size is independent of sample size". The effect size also indicates "how much of the dependent variable can be controlled, predicted, or explained by the independent variable(s) and can assist the researcher in clarifying whether statistically significant findings are of practical or meaningful significance within the context of an empirical investigation" (Snyder & Lawson 1993:334).

Guidelines for interpreting effect size as formulated by Cohen (1988) and cited by Ellis and Steyn (2003:53) refer to 0.2 as a "small effect or practically non-significant difference", to 0.5 as a "medium effect or practically visible difference" and to 0.8 as "a large effect size or practically significant difference."

6.9 QUALITATIVE STUDY DESIGN

Malhotra *et al.* (2017:150) define qualitative research as unstructured, exploratory, based on small samples and intended to provide depth, insight and understanding. As illustrated earlier in Figures 6-4 and 6-5, it allowed exploring quantitative findings to understand better quantitative results (Harrison & Reilly, 2011:16; Morgan, 1998:368). Malhotra *et al.* (2007:148) refer to using qualitative analysis to illuminate quantitative statistical findings. Williams (2007:67), in more simplistic terms, regards qualitative research as being "a holistic approach that involves discovery".

As discussed in philosophical assumptions (paragraph 6.3.2), the study is based on a blend of philosophies, including interpretivism. The interpretivism approach of the study resides in the qualitative aspect of the mixed method design. In this approach, the study placed "a substantial emphasis on how participants in a study make sense or meaning of a situation and experiences of participants in the research. The researcher, in turn, wrote a study that reflected personal views of the studied phenomenon. The researcher is not absent from the narrative but has personal views and interpretations. Hence, qualitative research is called "interpretive" research that reports participants' views "(Creswell & Millar, 1997:37).

Creswell and Miller (1997:43) and Williams (2007:67) identify five areas of qualitative research:

- **Case study** - "researcher explores in depth a program, an event, an activity, a process, or one or more individuals" (Creswell, 2003:15).
- **Ethnography study** - "the researcher studies an intact cultural group in a natural setting over a prolonged time by collecting, primarily, observational data" (Creswell, 2003:14). "The focus is on everyday behaviours to identify norms, beliefs, social structures, and other factors" (Williams 2007:68).

- **Phenomenological study** - “to understand an experience from the participants" point of view” (Leedy & Ormrod, 2001:157). “The focus is on the participant’s perceptions of the event or situation, and the study tries to answer the question of the experience” (Williams 2007:69).
- **Grounded theory study** - “researcher attempts to derive a general, abstract theory of a process, action, or interaction grounded in the views of participants in a study” (Creswell (2003:14). Williams (2007:68) further clarifies that grounded theory research begins with data that develops into theory.
- **Content analysis** is “a detailed and systematic examination of the contents of a particular body of materials to identify patterns, themes, or biases” (Leedy & Ormrod, 2001:155).

Inductive reasoning and associated research methodologies can be approached from these five areas of qualitative research. Within these five areas, researchers have a choice of a variety of qualitative techniques that can be used to gauge customer opinions and feelings, each with its unique strengths and weaknesses (Table 6.9)

Table 6-9: A comparison of qualitative research techniques

Criteria	Focus groups	In-depth interviews	Projective techniques	Ethnographic techniques
Degree of structure	Can vary from highly to loosely structured	Can vary from highly to loosely structured	Tends to be loosely structured	Loosely structured though can have a framework to guide observation
Probing of individual participants	Low	High	Medium	None when used in isolation and in a covert manner
Moderator bias	Medium	Relatively high	Low to high	None when used in isolation and in a covert manner
Uncovering subconscious information	Low	Medium to high	High	High
Discovering innovative information	High	Medium	Low	Medium
Obtaining sensitive information	Low	Medium	High	High
Involving unusual behaviour or questioning	No	To a limited extent	Yes	Perhaps on the part of the observer

Source: Adapted from Malhotra *et al.* (2017:228)

Malhotra *et al.* (2017:227) state that one technique is not necessarily better or worse than the other, and the choice of a qualitative research technique depends mainly on which the researcher deems most appropriate to serve the objectives of a particular study. When considering the nature of the research study, the problem statement, and the objectives, this

researcher's opinion was that content analysis through in-depth interviews would serve the mixed method study more effectively.

The in-depth interview technique described by Malhotra (1997:209), comprises "an unstructured, direct, personal interview in which an experienced interviewer probes a single participant to uncover underlying motivations, beliefs, attitudes and feelings on a topic". This technique was applied in the complementary exploratory section of the mixed method study and comprised in-depth semi-structured personal interviews with a selection of Communication Service Providers (CSP) retail store managers and training specialists of South African retail entities.

Interviews were structured and executed to:

- Obtain their opinion and comment on the applicability, validity, and efficacy of each of the twelve key drivers (variables/constructs) tested in the quantitative study concerning its influence on retail customer experiences.
- Indicate pragmatic retail-orientated tactics to support the implementation of each driver (construct) within the retail environment to improve customer experiences.

6.9.1 Qualitative target population, sampling method and sample size

Adler and Adler (cited by Baker & Edwards, 2012:8) refer to qualitative researchers as those researchers who "generally study many fewer people, but delve more deeply into those individuals, settings, subcultures, and scenes, hoping to generate a subjective understanding of how and why people perceive, reflect, role-take, interpret, and interact. Qualitative research methods differ from quantitative approaches in many important respects, not the least of which is the latter's emphasis on numbers".

Adler and Adler further state that "qualitative researchers, working in the context of discovery, are more open-ended and often follow emergent empirical and conceptual findings in unexpected ways. Thus, they may not know how much data they need to gather. The best answer is simply to gather data until empirical saturation is reached" (Adler & Adler, 2012:8). This comment is supported by Creswell and Poth (2016:64), stating that "how many passes one makes to the field depends on whether the categories of information become saturated and whether the theory is elaborated in all of its complexity".

Miller (cited by Baker & Edwards, 2012:31) agrees with this sentiment of saturation and add that there are no absolute numbers, "but refers to that point at which you sense you have

encountered the amount of repetition that gives you the confidence to write and make analytical generalisations”.

6.9.1.1 Target population

The qualitative target population consisted of retail store managers and training specialists from a prominent South African Communication Service Providers (CSP) retail entity that owns and manages 149 retail stores nationwide (Table 6-10). This company was purposively selected as one of the South African companies that implemented the customer journey methodology more than twenty (20) years ago. Store managers (149) were trained in the methodology and experienced in customer experience and customer journey terminology, principles, and strategies. Table 6-10 shows the store and managers per the company’s regional distribution. Gauteng and North Eastern regions combined constitute the South African Gauteng Province.

A purposive or judgmentally selected thirteen (13) retail store managers and four (4) retail training specialists, predominantly situated in the Gauteng Province, the targeted company and South African economic hub, were identified as the target population for the qualitative study.

Table 6-10: Retail store population distribution

Region	Company owned stores	Store managers	Dealership stores	Dealership store managers	Total store managers	
	n	n	n	n	n	%
Gauteng	25	25	22	22	47	51,0
North Eastern	19	19	10	10	29	
Western	19	19	14	14	33	22,2
Eastern	15	15	15	15	30	20,1
Southern	5	5	1	1	6	4,0
Central	3	3	1	1	4	2,7
Total	86	86	63	63	149	100

6.9.1.2 Sampling method and sampling size

A non-probabilistic, purposive sampling approach was used for the qualitative study. This approach is regarded by Guest *et al.* (2006:62) as the most commonly used approach, particularly in applied research.

Guest *et al.* (2006:62) refer to sixteen types of purposive samples with a common denominator: participants are selected according to predetermined criteria relevant to a particular research objective. This sentiment is supported by Etikan and Bala (2017:00149), who note that the researcher should focus on those people with the same opinion to have the required information and be willing to share it.

In qualitative research, the critical question faced by researchers is 'how many interviews' are required to achieve their study objectives. Baker and Edwards (2012:43) invited guidance from fourteen prominent qualitative methodologists on qualitative sample sizes but were met with an "it depends". This dependency relates to "epistemological and methodological questions about the nature and purpose of the research: whether the focus of the objectives and of analysis is on commonality or difference or uniqueness or complexity or comparison or instances, Practical issues to take into account include the level of degree, the time available, institutional committee requirements and both philosophically and pragmatically, the judgment of the epistemic community in which a student or researcher wishes to be or is located, is another key consideration" (Baker & Edwards, 2012:43).

Sampling for the qualitative study was focussed on the purposefully selected target population of thirteen (13) retail store managers and four (4) training specialists where sampling had been done based on saturation plus two (2) plus dependent on the richness of the data obtained (Guest *et al.*, 2006:62). Interviews were conducted by the researcher in person, based upon confirmed appointment dates with participants at their place of work or any other convenient location as agreed upon. Where it is impossible to conduct in-person interviews, participants were requested to consider and complete the online interview guide.

6.9.1.3 Qualitative study instruments and data collection

The interview methodology of data collection in the qualitative study allowed the researcher to ask, frame, interpret, examine, and get clarity on any unexpected results obtained from the quantitative study (Creswell, 2009:211). The researcher exercised judgment to "collect participant-led accounts that are as rich as possible" (Saunders *et al.*, 2019:146). Interviews were conducted in compliance to the requirements of the POPI Act.

Interview guides, consisting of semi-structured questions, were aimed at the judgmentally selected thirteen (13) retail store managers and four (4) training specialists residing in the Gauteng Province. The selected individuals were responsible for the functional implementation, management, control, and training of their individual retail companies' customer experience philosophy at a retail store level. The interview guides consisted of an introduction, the purpose

of the study, study objectives and general rules, a participant consent section, and guidelines applicable to the interview.

A brief overview of the methodology provided an introduction and stated the purpose of the study. This included naming the twelve conceptual customer experience constructs (12Es), stating the need for a sequential customer journey as the experience constructs a vehicle, its implementation, measurement, management, and maintenance.

In more detail, the interview guide defined and explained the customer experience constructs incorporated into the conceptual management framework. This was followed by questions and statements derived from the quantitative study results to obtain clarity, input, and feedback on the conceptual management framework's relevancy, appropriateness, and effect on customer experience. The interview guide mirrored the questions included in the quantitative survey.

All interviews applicable to the qualitative studies were arranged and conducted by the researcher in person, based upon confirmed appointment dates with participants at their place of work or other convenient locations as agreed upon.

The qualitative interview guide questions were used as a "loose guide" and not a rigid structure (Saunders *et al.*, 2019:156). Interviewees were encouraged to share their practical retail experiences on applying the twelve constructs. Interviews lasted between 45 to 60 minutes.

The study's objective was to conduct most of the interviews face-to-face and record with a recording device, with the consent of the interviewee. Where in-person interviews could not be held, the interview guide was emailed to participants to complete and emailed back to the interviewer. Clarifications, where required on the returned interview guides, were obtained through a personal phone call to the participant.

Data analysis methodology provides the scientific guidelines for reporting the study results, and the methods associated with data analysis for the quantitative and qualitative studies are dealt with in the following section.

6.9.1.4 Qualitative data analysis

The study applied a thematic analysis approach to analyse qualitative data. This approach is not only the most used method of analysis in qualitative research (Chapman *et al.*, 2015:201; Guest *et al.*, 2012:10) but also complies with the aim of qualitative research to capture "the complexities of meaning within a textual data set" (Guest *et al.*, 2012:10). The objective with the

data analysis was to identify and describe both implicit and explicit ideas within the data through themes and not to rely on counting explicit words or phrases (Guest *et al.*, 2012:9).

The application of thematic analysis for this mixed methods study was also recommended by Harrison (2013:2160), who state: “For example, if a researcher is employing an explanatory design, whereby qualitative data will explain quantitative findings, the qualitative data analysis should include textual coding, thematic development, and descriptions based on these codes”.

In concluding the interviews, the interviewer used the data analysis process entrenched in Grounded Theory as explained by Bernard and Ryan (1998:607): “(1) read verbatim transcripts, (2) identify possible themes, (3) compare and contrast themes, identifying structure among them, and (4) build theoretical models, constantly checking them against the data”. Through the identification of themes and issues, synthesizing data and sorting them into recognizable general categories (Charmaz, cited by Baker & Edwards, 2012:21), mapping it against the pre-prepared theoretical framework, and effect changes and modifications where required it enabled the researcher “to make a theoretical as well as an empirical contribution” (Saunders *et al.*, 2019:156).

In actively keeping notes (iterative “memoing”) about “the coding and about potential hypotheses and new directions for the research” the researcher became more and more “grounded in the data and develops increasingly richer concepts and models of how the phenomenon being studied really works” (Bernard & Ryan, 1998:607). Memo writing links coding to writing a first draft of the analysis.

As explained by Malhotra *et al.* (2017:253), memo writing links coding to writing a first draft of the analysis. This stage helps researchers define the properties of the categories they have created, specify conditions under which each category has developed, and note the impact of each category and the interrelationships with other categories. Memos can be anything from loosely written notes to fully formed analytical arguments added to the original data and interpretations. The process of memo writing helps the researcher to achieve the following:

1. Stop and think about what is emerging from the data.
2. Generate ideas to explore through other means of collecting data.
3. Reflected upon gaps and missed opportunities in earlier interviews and observations.
4. Reflect upon the meanings and impact of personal field notes.

5. Treat coded data as distinct categories to analyse.
6. Clarify categories, through their definitions, properties, distinctive elements, consequences, and interconnectivity with other categories.
7. Make explicit and constant comparisons of data with data, category with category, concept with concept". (Malhotra, 2017:253)

6.10 PILOT STUDY

Hewson (cited by Fielding *et al.*, 2016:58) cautions researchers against implementing poorly designed studies. Reips and Krantz (2010:196) refer to the importance of pilot studies with regards to the reliability and validity of the study and state: "It is crucial for trustworthiness, reliability and validity that researchers avoid this approach, take time to explore the existing available guidelines properly and to pilot procedures as extensively as possible before gathering data within the main phase of a research study". Sreejesh *et al.* (2014:15) concur with the statement and add that the benefit of a pilot study lies in collecting data from respondents, aiding an improved understanding of the subject matter that can assist the researcher in conducting the larger study.

In line with the stated pilot study advantages, the quantitative study's online questionnaire was pre-tested using a pilot study among four active retail customers. It was also pre-tested with staff from a marketing research company.

In the pilot questionnaire, the four respondents were allowed to indicate their understanding of the twelve variables (12Es) included in the conceptual customer experience management framework. Also, to give an opinion on the influences of the variables, once implemented, on levels of customer experience and consequently customer satisfaction, engagement, and re-patronage.

Learning points from the pilot study include the measuring instrument's applicability, respondent's comprehension of the conceptual management framework, ease of completing the questionnaire, and suitability of time parameters. The pilot also indicated that respondents understood scaling items, and it delivered more significant insights for analysis (Drotskie, 2009:210). The learnings enabled assessing the questionnaire's process, structure, and content. It also assisted in refining the process and questionnaire where required to ensure a higher level of reliability and validity of the measuring instrument (Duong, 2016:9).

Multiple inputs were received on the use of marketing jargon, and it was to be replaced by more straightforward customer-related language. These recommendations were accounted for, and after two iterations, the pilot group approved the questionnaire. The retail customer-approved questionnaire was then provided to a marketing research institution to be technically previewed before coding and launch. Minor semantical changes were made before the official launch of the questionnaire.

Lessons learned from the quantitative pilot study were used to update the qualitative interview guide before it was also piloted. The updated qualitative interview guide was piloted with two senior and experienced retail store managers situated in the Gauteng province.

Both pilot studies aimed to enhance the quantitative research instrument's reliability, validity, and technical soundness (Martella & Martella, 1999:179). Also, to ensure that the “instrument was designed to measure what it was supposed to measure” (Nemaenzhe, 2010:149).

6.11 ETHICAL CONSIDERATIONS

The essentiality of ethics in marketing research is aptly described by Malhotra *et al.* (2017:881) as “all marketing research is underpinned by effective ethical practice. Marketing researchers have a duty to participants and society to behave ethically. Applying ethical principles to marketing research is essential to producing high-quality research findings”.

Marketing research typically involves direct contact with participants throughout the research process, which can lead to abuse or misuse of the process to take advantage of participants (Malhotra *et al.*, 2017:884). Ethical standards are imperative to ensure sound marketing research practises, and several codes guide the industry. The most notable are the Marketing Research Association (MRA), the European Society for Opinion and Market Research (ESOMAR) and in South Africa, the South African Marketing Research Association (SAMRA).

Malhotra *et al.* (2017:885) note that although the codes might differ in language, they comprise basically the same broad principles. Firstly, they emphasise that research participation is voluntary and based on informed consent. Secondly, research should not cause any harm to participants, and particular care should be taken with vulnerable groups, such as children. Thirdly, participant privacy should be protected, and data should not be used for purposes other than research. Finally, like in most professional codes, there is a requirement to uphold the standards of the research profession, behave with integrity and abide by all relevant laws.

Ghuri and Gronhaug in Mokoena (2020:80) identify eight ethical issues that should guide the research relationship between researcher and participant. These issues include “preserving

participant's anonymity, exposing participant to mental stress, asking participants questions detrimental to their self-interest, use of special equipment and techniques (e.g., tape recorder, video or health hazardous equipment), involving participants in research without their consent, use of deception, use of coercion to get information, and depriving participants of their rights."

In addition to the code's institutions, such as ESOMAR and MRA, detailed guidelines are available to assist researchers with practical advice to comply with ethical standards applicable to data collection, working with secondary data, sampling, and bias. A detailed guideline, as issued by The Canadian Marketing Institution (in Malhotra *et al.*, 2017:896), refers to the duration of interviews in a qualitative study. It states that except for home face-to-face interviews, questionnaires that take more than 30 minutes to complete are generally considered overly long. Face-to-face home interviews can take up to 60 minutes without overloading the participants.

This study subscribed to the SAMRA code of ethical marketing research and complied with the research ethics guidelines of the NWU derived from ethical principles articulated in the Belmont Report of 1979 (Kruger *et al.*, 2014:2). This report guided the researchers in following ethical standards and proper procedures to protect research participants.

The study also adhered to the three Belmont ethical principles of (a) autonomy, which requires participants' informed consent to participate in the research study; (b) beneficence, relating to the minimising of potential risks to participants; and the principle of (c) justice, which refers to fair procedures and outcomes in the selection of research subjects (Zucker, 2014:2). The study was evaluated both scientifically and ethically by the appropriate faculty research proposal and research ethics committees. The ethical risk level associated with the research was assessed, and ethical clearance was obtained based on a minimum risk level.

6.12 CONCLUSION

This chapter provided a background to the research undertaken by referring to the reason for the research, the research philosophy, the problem, questions, and objectives. It discussed in more detail the research methodology and research design followed to address the research problem, provide answers to the research questions, and execute the study's research objectives. Figures 6-10 summarise the pilot study, the study population, and the sampling methodology.

This study adopted a mixed methods approach, applying the best quantitative and qualitative research methods. This approach, executed as a sequential explanatory study with a

quantitative study as a primary and a qualitative study as a secondary focus, enabled deductive and inductive analysis in the same research study.

Following the research design, the details about the quantitative and qualitative designs, study target populations and sampling, research instruments, data collection and data analysis were discussed. The non-probability judgment sampling method was used to recruit representative samples for both studies. Pilot studies were conducted for both the qualitative and quantitative phases to test and refine the research instruments used in this study.

The quantitative study utilised a web-based questionnaire hosted on an online survey server, which enabled email invitations to the target population of active retail customers. Invitations on WhatsApp supplemented this. A discussion guide was used in the qualitative study to collect data during personal interviews with study participants.

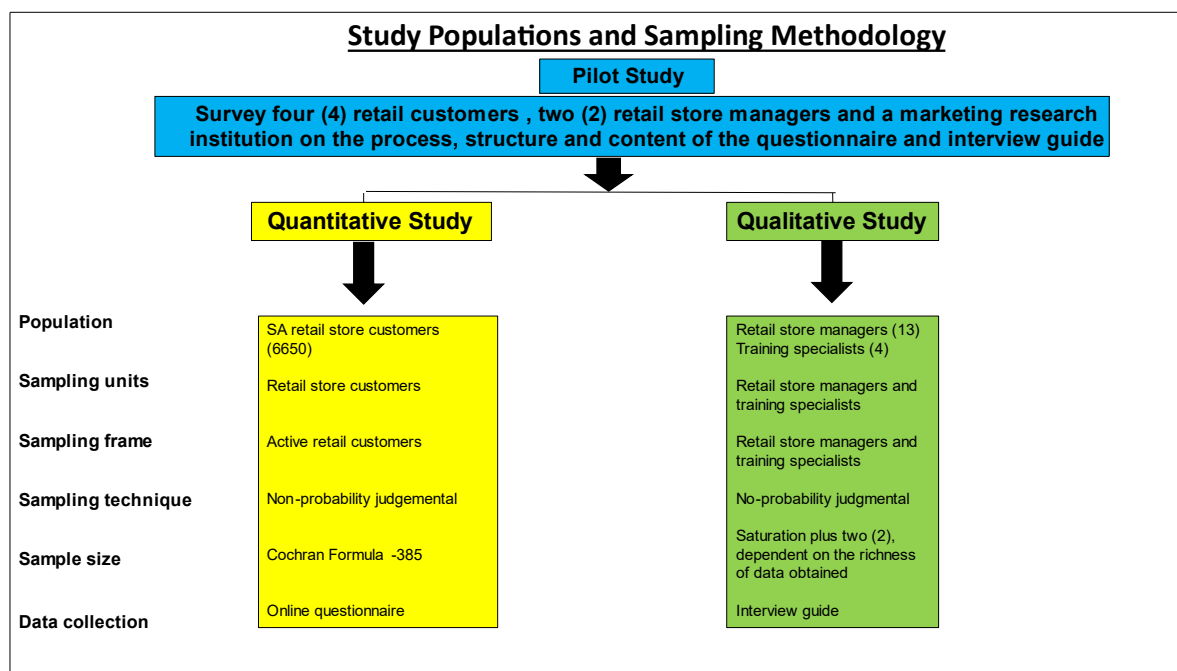


Figure 6-10: Study populations and sampling methodology

Quantitative data analysis used exploratory factor analysis. For the qualitative study, thematic data analysis was used. The IBM SPSS for Windows software package was used for the factor analysis.

Ethical considerations to be considered by researchers were also included in the chapter. These considerations were implemented to protect the rights of quantitative respondents and qualitative participants.

Chapter Seven discusses the quantitative and qualitative research findings.

CHAPTER 7 QUANTITATIVE RESEARCH RESULTS

7.1 INTRODUCTION

The preceding chapter provided background to the study's empirical research methodology. References were made to the reason for the research, the research philosophy, the research problem, the research questions, and the research objectives. The chapter discussed research questions, methodology, and design to address the research problem and execute the study's objectives.

This chapter deals with the results and an analysis of the applied research methodology comprising the quantitative phase of a sequential explanatory mixed-method study. It includes possible explanations of specific results aiming to provide answers to the research questions, as stated in Chapter One. The quantitative study tests the applicability, validity, efficacy, and impact of twelve key customer experience constructs (12Es) associated with a customer's journey through a South African retail store.

7.2 QUANTITATIVE PHASE OF STUDY

The quantitative phase of the mixed method study comprised an online survey aimed at active retail customers who transacted with a South African Communication Service Provider's (CSP) retail entity twelve months before the quantitative study. The quantitative survey questionnaire consisted of three sections (Appendix A). Section A's first section dealt with twelve experience constructs associated with a retail store customer journey. This study posited that the constructs should be considered in designing and implementing a customer-centric experience management framework for a physical retail shop. The second section, Section B, contained questions on the effects of a customer having a pleasant and fruitful customer experience. The third section, Section C, dealt with demographic questions aimed at sampled retail customers.

Due to the relatively large sample size, most results reported statistical significance, which did not necessarily imply importance in practice. As this is not a random sample study, the emphasis will be placed on interpreting the effect sizes, although p-values will be reported in all cases.

7.3 CONCEPTUAL MODEL

The study's conceptual model is reflected in Chapter One, Figure 1.5. The model was subjected to a quantitative study analysis based on two phases: an Exploratory Factor Analysis (EFA) and a Structural Equation Analysis, as depicted in Figure 7-1.

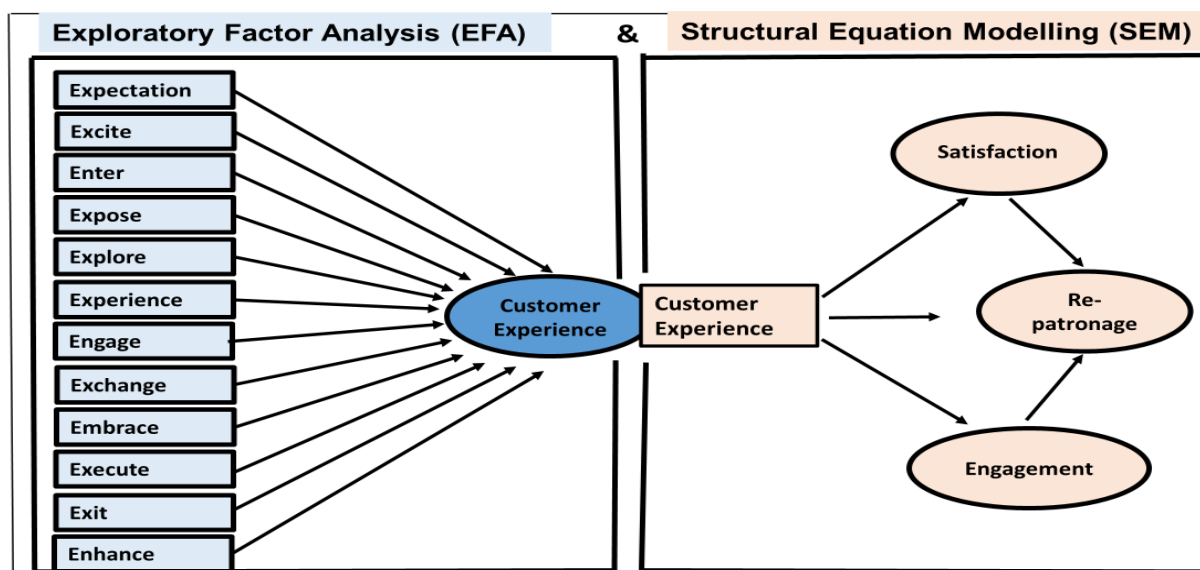


Figure 7-1: Quantitative study analyses

7.4 QUANTITATIVE STUDY FINDINGS (EFA)

This section reports on the outcomes of the quantitative analysis as reflected in frequency tables, descriptive statistics, reliability testing, factor analysis and ANOVA's.

Data analysis for the quantitative phase of the study was conducted using the Statistical Package for Social Sciences (SPSS). This software “undertakes both comparison and correlational statistical tests in the context of univariate, bivariate and multivariate analysis for both the parametric and non-parametric statistical techniques” (Org & Puteh, 2017:17). The Principal Components extraction method and the Direct Oblimin rotation method were considered to perform the factor analyses. The rationale for each of these measures was stated, guidelines for interpretation were provided, reported measures were compared to guidelines, and the meanings thereof were highlighted in reporting the findings.

7.4.1 Frequencies and descriptive statistics

Summarizing and examining data from research studies can be divided into two categories: descriptive and inferential (Nick, 2007:33). Descriptive statistics are used to display data in a concise manner enabling the uncovering of patterns within the data and estimate characteristics of the respondents (Nick, 2007:33). Larson (2006:76) refers to descriptive statistics as “numbers that characterize features of specific data” being presented in tables and graphs.

Inferential statistics typically refers to statistics being applied to make inferences about populations from which data were sampled (Larson, 2006:76). This study, however, was not random, and no inferences were made about a population.

The frequencies of categorical data such as gender, age, level of education, language, profession, and geographic location were presented in frequency tables as suggested by Nick (2004:33). Descriptive statistics were also presented for the continuous variables using frequency and descriptive statistic tables containing means and standard deviations, as suggested by Creswell (2014:225).

7.4.1.1 Descriptive statistics of demographical variables

The presentation of descriptive statistics through frequency distribution tables was a convenient manner to illustrate different values of the study's categorical variables (Malhotra *et al.*, 2017:562). A frequency distribution represented a "tabular summary of data showing the number of observations in each of several nonoverlapping categories of classes" (Anderson *et al.*, 2015:96). The following table (Table 7-1) provides the basic information applicable to the demographics of the study's researched sample as recorded in Section C of the quantitative questionnaire.

Table 7-1: Frequency table for demographics – Section C

Demographics	Frequency (f)	Percentage (%)
Gender		
Male	290	71%
Female	117	29%
TOTAL	407	100%
Age		
18 - 25 years old	23	6%
26 - 35 years old	121	30%
36 - 45 years old	93	23%
46 – 55	56	14%
56 – 65	66	16%
+ 65 years old	48	12%
TOTAL	407	100%
Level of education		
Secondary	95	23%

Demographics	Frequency (f)	Percentage (%)
Certificate (TVET)	83	20%
Under-graduate	84	21%
Post-graduate	130	32%
Other	15	4%
TOTAL		100%
Language		
English	179	44%
Afrikaans	120	30%
isiZulu	30	7%
isiXhosa	13	3%
Sepedi	13	3%
Sesotho	13	3%
Setswana	12	3%
Other	23	6%
TOTAL	403	100%
Missing	4	
Profession		
Professional	158	39%
Administrative	58	14%
Pensioner	42	10%
Homemaker	26	6%
Unemployed	20	5%
Construction/mining	14	3%
Sales agent	12	3%
Student	9	2%
Other	68	17%
TOTAL	407	100%
Geographic Location		
Gauteng	220	54%
Western Cape	76	19%
KwaZulu-Natal	60	15%
Mpumalanga	16	4%
Eastern Cape	14	3%

Demographics	Frequency (f)	Percentage (%)
Free State	9	2%
Northwest	7	2%
Limpopo	5	1%
TOTAL	407	100%

The findings contained in Table 7-1 can be summarised as follows:

The majority of the participants were male (70%). Two age groups, 36-35 years (30%) and 36-45 years (23%), accounted for more than half of the respondents. The educational representation showed the highest portion being postgraduates (32%), with each of the other three educational categories all in the region of 20%.

Most respondents (44%) indicated English as their home language, followed by Afrikaans (30%). Respondents mainly resided in the Gauteng Province (54%) followed by the Western Cape (19%) and Kwa-Zulu Natal (15%). The majority of respondents fell within the professional (39%) occupational group followed by administrative (14%) pensioners (10%) and homemakers (6%).

7.4.1.2 Descriptive statistics for continuous variables

Though a frequency distribution is a convenient way of looking at different variable values, the researched information can be so detailed that it requires the researcher to summarise it using descriptive statistics (Malhotra *et al.*, 2017:562). Descriptive statistics for this study includes frequencies, means and standard deviations.

The frequencies and descriptive statistics in Tables 7-2 to 7-12 were based on five-point Likert Scale responses to Sections A and B of the quantitative survey questionnaire. Section A referred to the proposed retail customer-centric experience management model comprising twelve experience constructs associated with a customer's journey through a retail store. The applicability, validity, and efficacy of each of the twelve constructs were surveyed as the study posited that the constructs should be considered in designing and implementing an experience management framework aimed at a physical retail shop. Section B related to active retail customers' opinions on the impact of good and satisfying customer experiences and whether customers should experience a pleasant and fruitful retail interaction.

The findings were presented as Frequencies, Means and Standard Deviations. Malhotra *et al.* (2017:562) describe the Mean, or average value, as the most commonly used measure of

central tendency. The measure estimates the mean for interval or ratio scale data. The data should display some central tendency, with most responses distributed around the mean. Standard deviations reflected a measure of variability as they indicated how much the scores varied from the mean, signifying the distribution's dispersion (Malhotra *et al.*, 2017:563).

7.4.1.2.1 Section A findings

Tables 7-2 to 7-13 reflect active retail customers' assessments of each of the twelve experience constructs entrenched in the conceptual retail customer-centric experience management model, as reflected in Section A of the quantitative questionnaire.

Table 7-2 reflects respondents' assessments of the role expectations play in a customer's experience of a retail store. These results showed the highest mean, 4,65 (SD = 0,79) reported for Question 4: "When a retail store succeeds in satisfying the requirements and expectations of customers, will it positively influence customer's experience of the retail store?". This indicated that respondents, on average, strongly agreed with the statement.

Table 7-2: Frequencies and descriptive statistics for the 'Expect' construct

Expect Retail management should focus on determining what customers expect from retail stores and attempt to satisfy customer expectations							
Question	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
1 Customer's expectations of a retail store have a direct impact on how they experience a retail store (positive, neutral, or negative)?	3,4	0,5	5,2	41,3	49,6	4,33	0,88
2 Retail stores should formally conduct market research studies to determine what customers expect from retail stores?	2,5	1,0	4,9	40,0	51,6	4,37	0,83
3. Retail stores should continually strive to change and adapt to satisfy customers' ever-changing requirements and expectations?	2,2	1,5	5,9	34,9	55,5	4,40	0,84

Expect Retail management should focus on determining what customers expect from retail stores and attempt to satisfy customer expectations							
Question	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
4. When a retail store succeeds in satisfying the requirements and expectations of customers, it will positively influence customer's experience of the retail store?	2,5	0,5	2,5	28,0	66,5	4,56	0,79
5. When a retail store is not able to satisfy customer's requirements and expectations, it will negatively influence a customer's experience of the retail store?	2,5	0,5	7,4	36,6	53,0	4,37	0,84

Respondent's assessments regarding *exposing* customers visiting a retail store to physical proof that the retailer acknowledges and adheres to customer requirements and expectations (see Table 7-3).

Responses to Question 6 indicated (mean = 2,9, SD = 0,78) that respondents, on average, felt neutral about the statement that retailers who advertise that they adhere to what customers expect is enough proof that they do so at the retail store level. The means for Question 7 (mean = 4.23, SD = 0.78) showed that respondents, on average, agreed that physical evidence and proof, at the retail store level, of adhering to customer requirements and expectations can positively impact on customer experiences of a retail store. Conversely, the non-demonstration (not visible or tangible proof) of adhering to customer requirements and expectations can negatively impact a retail store's customer experiences (Question 8, mean = 4,00, SD = 0,91).

Table 7-3: Frequencies and descriptive statistics for the 'Expose' construct

Expose <i>Retail management should focus on exposing customers visiting a retail store to physical proof that the retailer acknowledges and adheres to customer requirements and expectations</i>							
Question	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
6. Retailers who advertise that they adhere to what customers expect is enough proof that they do so at retail store level?	13,5	32,9	17,2	23,1	13,3	2,90	1,28
7. Physical evidence and proof, at retail store level, of adhering to customer requirements and expectations can positively impact on customer experiences of a retail store?	2,2	0,2	7,1	53,1	37,3	4,23	0,78
8. The non-demonstration (not visible or tangible proof) of adhering to customer requirements and expectations can have a negative impact on customer experiences of a retail store?	2,7	3,2	16,0	47,9	30,2	4,00	0,91

Table 7-4 focuses on the importance of creating excitement among retail customers. Responses to Question 9 indicated that retail customers want to be excited (stimulated) by easy-to-shop store layouts (mean = 4,51, SD = 0,72), competitive offerings (mean = 4,37, SD = 0,81) and a stimulating store atmosphere (mean = 4,34, SD = 0,81). Thrilling store promotions registered the lowest mean of 4,26 (SD = 0,89), indicating a lesser impact on creating excitement among retail customers. The mean of 4,48 (SD = 0,73) for Question 10 indicated that respondents strongly agreed with the statement, "Retail stores that succeed in increasing customer excitement through pleasant and rewarding shopping can positively influence customer experiences".

Table 7-4: Frequencies and descriptive statistics for the ‘Excite’ construct

Exciting Retail management should focus on exciting (stimulating) customers with retail store window displays, store layouts and exhibits, products, prices, and promotions							
Question	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
9. Retail customers want to be excited (stimulated) by; (a) easy-to-shop store layouts, (b) a stimulating store atmosphere, (c) thrilling store promotions, (d) competitive offerings?							
	1,5	0,2	3,9	34,6	59,7	4,51	0,72
	1,7	1,7	5,9	42,3	48,4	4,34	0,81
	2,2	0,7	14,5	33,7	48,9	4,26	0,89
	2,0	0,2	8,6	36,9	52,3	4,37	0,81
10. Retail stores that succeed in increasing customer excitement through pleasant and rewarding shopping can positively influence customer experiences?	1,5	0,7	3,2	37,6	57,0	4,48	0,73
11. Uninteresting (normal, uninspiring, dull) retail store settings and offerings can negatively influence customer shopping experiences?	2,5	2,5	10,8	42,0	42,3	4,19	0,90

Respondents’ assessment of the significance of a store entry and its role in experiences is reflected in Table 7-5.

Retail customer requirements on entering a retail store (Questions 12 to 15) showed that respondents, on average, strongly agreed with the statement of Question 12 that the reception (ease of entry, welcoming, courteousness) at entering a retail store is important to customers (mean = 4,39, SD = 0,82) and that store entry can play an important role in the customers’ overall retail store experience (Question 11, mean = 4,34, SD = 0,78). Respondents indicated that special attention to elements that provide customers with a good first impression at store entry can contribute positively to a customer’s overall shopping experience (Question 13, mean = 4,36, SD = 0,77) and that an uninviting experience at retail store entry, Question 15, can negatively impact on the overall shopping experience (mean = 4,29, SD = 0,84).

Table 7-5: Frequencies and descriptive statistics for the ‘Enter’ construct

Enter							
Retail management should focus on the reception of customers when they enter the store							
Question	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
12. The reception, (ease of entry, welcoming, courteousness) at entering a retail store is important to customers?	2,0	0,7	7,4	36,6	53,3	4,39	0,82
13. The customers' experience at store entry can play an important role in the customers' overall retail store experience?	2,0	0,2	6,9	43,2	47,7	4,34	0,78
14. Special attention to elements that provide customers with a good first impression at store entry can contribute positively to a customer's overall shopping experience?	1,7	0,7	5,2	44,5	47,9	4,36	0,77
15. An uninviting experience at a retail store entry can negatively impact on customer impressions, perceptions, opinions, and overall shopping experience?	2,0	2,0	7,4	42,0	46,7	4,29	0,84

Table 7-6, reflecting on enabling customers to explore a retail store, showed the respondents' appreciation for being enabled to explore a retail store (Question 16, mean = 4,25, SD = 0,80). Respondents, on average, strongly agreed with Question 17 (mean = 4,44, SD = 0,72) that customer exposure to well-planned, clearly signed, well-lit and well-structured retail store environments, encouraging store explorations, can positively influence a shopping experience. Respondents, on average, also strongly agreed with the statement of Question 18 (mean = 4,39, SD = 0,80) that unorganised store layouts can negatively influence shopping experiences.

Table 7-6: Frequencies and descriptive statistics for the ‘Explore’ construct

Explore Retail management should focus on enabling customers to physically explore (walk around) the store freely, unhindered, and unrestricted							
Question	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
16. Customers appreciate the opportunity to explore a retail store where the store layout enables and encourages store explorations?	2,0	0,5	9,3	47,2	41,0	4,25	0,80
17. Exposing customers to well-planned, clearly signed, well-lit and well-structured store environments, that encourages store explorations, can positively influence a shopping experience?	1,2	0,7	3,9	40,5	53,6	4,44	0,72
18. Unorganised, unimaginative store layout can hinder store explorations and can negatively influence shopping experiences?	1,7	1,2	6,1	38,6	52,3	4,39	0,80

Table 7-7 focused on retail management’s responsibility to enable customers to physically experience (touch, feel, test) store products and offerings. Retail customer responses on Question 19 showed that it is important to be enabled to examine retail merchandise while browsing through the store (mean = 4,27, SD = 0,80). They also indicated through Question 20 responses that having the opportunity to examine store merchandise physically can positively influence their retail shopping experiences (mean = 4,31, SD = 0,78). On average, respondents also agreed with the statement of Question 21 that preventing them from experiencing store merchandise can negatively influence their retail shopping experiences (mean = 4,09, SD = 0,90).

Table 7-7: Frequencies and descriptive statistics for the ‘Experience’ construct

Experience Retail management should focus on allowing customers to physically experience (touch, feel, test) store products and offerings							
Question	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
19. It is important to customers to examine (touch, feel, test) retail merchandise while browsing through the store?	1,5	0,7	10,8	43,5	43,5	4,27	0,80
20. Customers having the opportunity to physically engage with and examine store merchandise can positively influence their retail shopping experiences?	1,7	0,5	7,9	45,0	45,0	4,31	0,78
21. Customers being prevented to experience store merchandise through examining it (locked behind glass panels or inaccessible) can negatively influence their retail shopping experiences?	1,5	3,2	18,4	39,1	37,8	4,09	0,90

The importance of how customers prefer to be engaged in a retail store is contained in Table 7-8. Respondents on average strongly agreed with Question 22 in that they, in order of the highest to the lowest mean scores, prefer to be engaged by well-trained (mean = 4,54, SD = 0,70), knowledgeable (mean = 4,53, SD = 0,69), respectful (mean = 4,53, SD = 0,69), professional (mean = 4,50, SD = 0,72) and courteous store staff (mean = 4,40, SD = 0,78). Responses to Question 23 indicated that respondents strongly agree that timely and considerate staff-to-customer engagements and interactions can positively influence the overall customer shopping experience (mean = 4,50, SD = 0,72). Conversely, respondents indicated in Question 24 that, on average, they strongly agreed that poorly timed, irritating, and haphazard customer interactions could negatively influence the overall customer shopping experience (mean = 4,49, SD = 0,67).

Table 7-8: Frequencies and descriptive statistics for the ‘Engage’ construct

Engage Retail management should focus on how to engage (connect with) customers in a cordial, pleasant and professional manner							
Question	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
Customers appreciate engaging with: (a) well trained, (b) knowledgeable, (c) courteous, (d) respectful, (e) professional store staff... during their journey through the retail store?							
	1,0	0,2	5,2	31,0	62,7	4,54	0,70
	1,2	0,5	2,7	34,9	60,7	4,53	0,69
	1,5	1,0	6,9	37,6	53,1	4,40	0,78
	1,2	0,2	2,9	35,1	60,4	4,53	0,69
	1,2	0,5	4,7	33,9	59,7	4,50	0,72
23. Timely and considerate staff-to customer engagements and interactions can positively influence the overall customer shopping experience?	0,7	0,7	3,2	39,6	55,8	4,50	0,72
24. Poorly timed, irritating, and haphazard engagements and interactions with customers can negatively influence the overall customer shopping experience?	1,5	0,5	3,7	33,2	61,2	4,49	0,67

Respondent's responses on requirements regarding staff and customer conversational exchanges during the customer in-store shopping journey are reflected in Table 7-9.

The highest mean is recorded for Question 27 (mean = 4,57, SD = 0,72), indicating that respondents, on average, strongly agreed that the absence of shop staff when required or customer exchanges with poorly trained/unskilled staff can negatively influence shopping experiences. Responses to Question 26 showed that respondents, on average, agreed (mean = 4,54, SD =0,65) that customer exchanges with knowledgeable, appreciative, courteous, and interpersonally well-skilled staff can have a positive influence on shopping experiences.

Table 7-9: Frequencies and descriptive statistics for the 'Exchange' construct

Exchange Retail management should focus on staff and customer conversational exchanges during the customer in-store shopping journey							
Question	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
25. Customers appreciate and hold in high regard the timely availability of store staff to assist during the shopping journey?	1,2	0,7	4,2	38,6	55,3	4,46	0,72
26. Customer exchanges with knowledgeable, appreciative, courteous, and interpersonally well-skilled staff can have a positive influence on shopping experiences,	1,0	-	2,7	38,3	58,0	4,52	0,65
27. The absence of shop staff when required or customer exchanges with poorly trained/unskilled staff can have a negative influence on shopping experiences?	1,5	0,5	2,9	29,7	65,4	4,57	0,72

Embracing customer needs, requirements, opinions, and comments in instances of customer engagements in retail stores (Questions 28 to 30) as highly regarded among respondents, as reflected in Table 7-10. Responses to Question 29 indicated that respondents on average strongly agreed (mean =4,45, SD = 0,65) that embracing their requirements through attentive listening and receptive skills can positively influence customer shopping experiences. Respondents, on average, also strongly agreed (mean = 4,51, SD = 0,69) that the absence of appreciation shown for customer needs, requests, problems, comments, or opinions can negatively influence customer shopping experiences.

Table 7-10: Frequencies and descriptive statistics for the ‘Embrace’ construct

Embrace Retail management should focus on empowering staff to invite, discuss, and embrace customer needs, requirements, opinions, and comments in customer engagement sessions							
Question	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
28. Customers appreciate staff embracing and responding to their unique requirements, their opinions, and comments and/or their questions on merchandise and offers?	1,2	0,7	7,4	44,5	46,2	4,34	0,75
29. Embracing customers' requirements through attentive listening and receptive skills can have a positive influence on customer shopping experiences?	0,7	-	4,2	43,5	51,6	4,45	0,65
30. The absence of appreciation shown for customer needs, requests, problems, comments, or opinions can negatively influence customer shopping experiences?	1,2	0,2	3,4	36,1	59,0	4,51	0,69

Table 7-11 reflects responses on retail customer requirements regarding processes to execute and conclude sales transactions effectively. Respondents to Question 31, on average, strongly agreed (mean = 4,59, SD = 0,63) that customers appreciate and value a speedy and efficiently executed sales transaction.

Respondents, on average, strongly agreed (Question 32, mean = 4,57, SD = 0,65) that efficiently processing a sales transaction can positively influence customer shopping experiences. Respondents also, on average, strongly agreed (Question 33, mean = 4,48, SD = 0,78) that processing a sales transaction in a good-riddance manner (e.g., through ineffective pay point technology) can negatively influence customers' shopping experiences.

Table 7-11: Frequencies and descriptive statistics for the ‘Execute’ construct

Execute Retail management should focus on processes to effectively execute and conclude sales transactions							
Question	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
31. Customers appreciate and value a speedy and efficient executed sales transaction?	0,7	-	3,2	31,7	64,4	4,59	0,63
32. Processing a sales transaction in an efficient manner can have a positive influence on customer shopping experiences?	1,0	0,2	2,0	34,9	61,9	4,57	0,65
33. Processing a sales transaction in a good-riddance-manner (e.g., through ineffective pay point technology (tills)) can have a negative influence on customers shopping experiences?	1,7	1,0	4,7	33,2	59,5	4,48	0,78

Table 7-12 shows respondent’s assessments of the role and importance of customers exiting a retail store. In considering the processes associated with customers exiting a retail store, responses to Question 34 indicated that respondents, on average, agreed to strongly agreed (mean = 4,19, SD = 0,80) that the store exit process should be regarded as an important concluding element of a customers’ in-store retail journey. In considering Question 35, respondents agreed to strongly agreed (mean = 4,33, SD = 0,77) that courteous, well-executed exit processes, leaving a customer with a good impression, can positively influence a customer’s overall shopping experiences.

Table 7-12: Frequencies and descriptive statistics for the 'Exit' construct

Exit Retail management should focus on the processes associated with customers exiting the retail store							
Question	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
34. The customer shop exit process should be regarded as an important concluding element of a customers' in-store retail journey?	1,5	1,0	12,5	46,9	38,1	4,19	0,80
35. A courteous well executed exit process leaving a customer with a good impression can have a positive influence on a customer' overall shopping experience?	1,2	0,7	9,1	42,0	46,9	4,33	0,77
36. A poorly executed (aloof, frosty) customer exit process can result in a discouraging impression that can have a negative influence on a customer's overall shopping experience?	1,5	1,0	9,3	43,0	45,2	4,29	0,80

Table 7-13 presents the responses to the requirement that retail management should focus on enhancing and constantly updating the retail store, improving service levels, and changing offerings as per customer requirements and expectations. Responses to Question 38 registered the highest mean of 4,30 (SD = 0,72), indicating that respondents, on average, agreed that obtaining customer feedback and acting there-on by implementing suggested enhancements can ensure higher levels of future customer experiences. On the contrary, respondents, on average, agreed (mean = 4,25, SD = 0,80) that retailers refraining from executing the suggested enhancements might lose customers and cause them to switch to competitors.

Table 7-13: Frequencies and descriptive statistics for the ‘Enhance’ construct

Enhance Retail management should focus on enhancing (improving) and constantly updating the retail store, improving service levels, change offerings as per customer requirements and expectations							
Question	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
37. Customers value the opportunity to provide retail entities with shopping experience feedback that can lead to enhanced (improved) customer experiences?	1,0	3,2	13,8	46,4	35,6	4,13	0,83
38. Obtaining customer feedback and act there-on by accepting customer advice and implement suggested enhancements can ensure higher levels of future customer experiences?	1,0	0,2	8,8	47,7	42,3	4,30	0,72
39. Retail entities sourcing customer feedback but refraining from executing the suggested enhancements might lose customers and cause them to switch to competitors?	1,2	1,2	11,5	43,0	43,0	4,25	0,80

7.4.1.2.2 Section B findings

The following tables, Table 7-14 to Table 7-18, reflect the impact or result of good and satisfying customer experiences on customer engagement, customer satisfaction and customer re-patronage as reflected in Section B of the quantitative questionnaire.

In Table 7-14 respondents, on average, agreed to strongly agreed with Question 40 (mean = 4,29, SD = 0,81) that customer engagement is important to a retail store’s profitability and survival. Respondents on average, also agreed to strongly agreed (mean = 4,36, SD = 0,75) with Question 41 that highly rated customer experiences can positively impact customer engagement.

Table 7-14: Frequencies and descriptive statistics for the effect of customer experience on customer engagement

Customer experiences has a direct effect on customer engagement (to emotionally connect with customer)							
Question	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
40. Customer engagement is important to a retail store's profitability and survival?	1,7	0,7	9,8	41,8	45,9	4,29	0,81
41. Highly rated customer experiences can have a positive impact on customer engagement (to emotionally connect with customer)?	1,5	0,5	6,1	44,7	47,2	4,36	0,75
42. Poorly rated customer experiences can result in low customer engagement (to emotionally connect with customer)?	1,2	1,5	9,3	45,0	43,0	4,27	0,79

The impact of customer experience on customer satisfaction, as reflected in Question 43 of Table 7-15 showed that respondents on average strongly agreed (mean = 4,52, SD = 0,71) that customer satisfaction is important to a retail store's profitability and survival. On average, respondents strongly agreed (mean = 4,47, SD = 0,67) with the statement in Question 44 that customer experience can positively impact customer satisfaction, and thus suggest a causal relationship between customer experience and profitability.

Table 7-15: Frequencies and descriptive statistics for the effect of customer experience on customer satisfaction

Customer experiences has a direct effect on customer satisfaction							
Question	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
43. Customer satisfaction is important to a retail store's profitability and survival?	1,2	0,5	3,9	33,9	60,4	4,52	0,71
44. Highly rated customer experiences can have a positive impact on customer satisfaction levels?	1,0	0,2	3,2	41,8	53,8	4,47	0,67

Customer experiences has a direct effect on customer satisfaction							
Question	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
45. Poorly rated customer experiences can result in low customer satisfaction levels?	1,0	0,2	7,6	42,5	48,6	4,38	0,72

On average, respondents in Table 7-16, Question 46 strongly agreed (mean = 4,49, SD = 0,74) that customers who are emotionally engaged with a retail store will be more likely to revisit the store. As per Question 47, respondents, on average, also agreed to strongly agreed (mean = 4,20, SD = 0,86) that customers who are not engaged emotionally will be more likely to switch to other retail stores.

Table 7-16: Frequencies and descriptive statistics for the effect of customer engagement on customer re-patronage

Customer engagement (emotional connecting with customer) has a direct effect on customer intentions and actions to re-visit retail stores (re-patronage)							
Question	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
46. Who connect with a retail store (emotionally engaged) will be more likely to re-visit the store?	1,5	0,5	4,4	35,1	58,5	4,49	0,74
47. Customers who do not connect with a retail store (not emotionally engaged) will be more likely to switch to other retail stores?	1,5	2,2	13,5	40,8	42,0	4,20	0,86

The effect of customer satisfaction on customer re-patronage is reflected in Table 7-17. Respondents to Question 48, on average, strongly agreed (mean = 4,55, SD = 0,69) that customers who are satisfied with a retail store will be more likely to re-visit the store while those not satisfied (Q49, mean = 4,40, SD = 0,76) will be more likely to switch to other retail stores.

Table 7-17: Frequencies and descriptive statistics for the effect of customer satisfaction on customer re-patronage

Customer satisfaction has a direct effect on customer intentions and actions to re-visit retail stores (re-patronage)							
Question	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
48. Customers who are satisfied with a retail store will be more likely to re-visit the store?	1,2	0,2	3,2	33,2	62,2	4,55	0,69
49. Customers who are not satisfied with a retail store will be more likely to switch to other retail stores?	1,7	0,5	4,9	41,5	51,4	4,40	0,76

Table 7-18 reflected respondents' opinion on the relationship between customer experience and customer intentions and actions to re-visit retail stores (re-patronage). Responses to Question 50 indicated that respondents, on average, strongly agreed (mean = 4,48, SD = 0,68) that highly rated customer experiences can have a positive impact on customer retention, loyalty, and customer re-visits. However, poorly rated customer experiences (Question 51, mean = 49,6, SD = 0,69) can negatively impact customer retention, loyalty, and re-visits.

Table 7-18: Frequencies and descriptive statistics for customer experience on customer re-patronage

Customer experiences has a direct effect on customer intentions and actions to re-visit retail stores (re-patronage)							
Question	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean	Standard Deviation
50. Highly rated customer experiences can have a positive impact on customer retention, - loyalty and customer re-visits?	1,2		3,2	40,3	55,3	4,48	0,68
51. Poorly rated customer experiences can have a negative impact on customer retention, - loyalty and customer re-visits?	1,0		5,9	43,5	49,6	4,41	0,69

The preceding three tables (Tables 7-16 to 7-18) considered statements about the effect or result of customer engagement (Questions 46 to 47), customer satisfaction (Questions 48 to 49) and customer experience (Questions 50 to 51) on customer re-patronage intentions. All three tables indicated that more than 84% agreed strongly agreed that customer engagement, customer satisfaction, and customer experience directly effect customer re-patronage intentions.

The descriptive statistical analysis of Section A (Questions 1 to 39) and Section B (Questions 40 to 51) was followed by a factor analysis described by Malhotra *et al.* (2017:219) as a method “to discover the important underlying factors or dimensions that encapsulate a particular form of behaviour”. Malhotra *et al.* (2017:548) also regard factor analysis as “the major technique for examining variable interdependence”.

7.4.2 Factor Analysis

Factor analysis is a methodology to reduce a large number of variables “into a smaller set “of factors or constructs (Taherdoost *et al.*, 2022:375) by regrouping “variables into a limited set of constructs based on shared variance” (Young & Pearce, 2013:79). Ehie and Madsen (2005:545) support these notions and identify factor analysis primarily as a data reduction technique. It enables researchers to isolate constructs and concepts and provides researchers with a simpler “method of interpretation of observed data” (Young & Pearce, 2013:79). This sentiment is supported by Malhotra *et al.* (2017:709), who stated that the representation of most correlated variables “in terms of a few underlying factors” enhances the ability to examine “relationships among sets of interrelated variables”.

Williams *et al.* (2010:2) refer to factor analysis as a technique to “establishes underlying dimensions between measured variables and latent constructs, thereby allowing the formation and refinement of theory”. Factor analysis also explains the commonality between the variable loading seen in each factor (Kent, 2019:7).

7.4.2.1 Limitations of factor analysis

As a statistical approach, factor analysis has limitations, as highlighted in Chapter 6. Yong and Pearce (2013:81) refer to the incorrect naming of factors, split loadings, and large sample sizes for the sake of factor reliability, while Williams *et al.* (2010:3) cite the possible subjectiveness of results due to pragmatic and not theoretical decisions regarding number of factors and rotational scheme.

This study acknowledges the limitations and criticisms associated with factor analysis and attempts to reduce and discount the limitations by choosing the most appropriate factor analysis technique that supports study objectives.

7.4.2.2 Factor analysis techniques

The two main factor analysis techniques, as identified in the literature and discussed in Chapter 6, are Exploratory Factor Analysis (EFA) and Confirmatory Factor Analysis (CFA) (Williams *et al.*, 2010:2; Yong & Pearce, 2013:79).

This study adopted an EFA approach “to explore the main dimensions to *generate* a theory, or model from a relatively large set of latent constructs often represented by a set of items” (Yong & Pearce, 2013:79). Also, to “uncover complex patterns by exploring the dataset and testing predictions” (Williams *et al.*, 2010:2) and to “examine or test an assumed structure” (Gronhaug, 2002:165). The EFA process supports identifying a small number of factors “that can parsimoniously explain the covariation observed among a set of measured variables” (Watkins, 2018:219).

An Exploratory Factor Analysis (EFA) per theoretical construct was considered suitable. The EFA enabled the researcher to “arrive at a more parsimonious conceptual understanding of a set of measured variables” and identify “a set of latent constructs underlying a battery of measured variables” (Fabrigar *et al.*, 1999:274).

The exploratory factor analysis (EFA) was conducted according to the procedure associated with “an empirically supported systematic approach that simplifies the many guidelines and options associated with completing EFA” as proposed by Williams *et al.* (2010:1). To limit the subjectiveness of EFA as suggested by Henson and Roberts (2006:396,410) this study applied the criteria of systematism, thoughtfulness, and the application of a “sound judgement to latent variables and factor reduction and construction” (Williams *et al.*, 2010:3).

The study’s EFA was conducted, and findings were presented, taking into consideration Pohlmann’s (2004:20) and Fabrigar *et al.* (1999:273) five methodological issues and in line with a summarised version of Williams *et al.* (2010:4) five-step sequential and linear EFA protocol (Chapter 6). The methodological issues and the protocol provided a “clear decision pathway” (Williams *et al.*, 2010:3) that commenced with the establishment of data suitability for factor analysis, followed by how to extract the factors, then selecting what criteria to use in factor extraction, selecting a rotational method and lastly interpreting and labelling the factors (Williams *et al.*, 2010:4).

7.4.2.3 Assessing data suitability

Although sample size is an important requirement for factor analysis (as discussed in Chapter 6), the literature is not clear on required sizes and cites varying options and several guiding rules of thumb that can be applied by researchers (Hogarty *et al.*, 2005:203; Schmitt, 2011:304; Williams *et al.*, 2010).

This study considered several sample size guides and rules of thumb in the decision to conduct a factor analysis. The opinions of researchers such as Tabachnick and Fidell (1996:640), who suggest a sample size of at least 300, Williams *et al.* (2010:4), who suggest sample sizes of at least 100; and Henson and Roberts (2006:401), who quoted sample sizes of 100 as poor, 200 as fair, 300 as good, 500 as very good, and 1000 or more, as excellent were all considered in the factor analysis decision-making process.

Other researchers such as Auerswald and Moshagen (2019:4), Henson and Roberts (2006:402), Kyriazos (2018:2208) and Sim *et al.* (2021:81) cite indicators of suitable sample size considerations. They suggest that the data features, as reflected by high communalities (greater than 0.60) and factors defined by several items, indicate an acceptable sample size. The opinion of Williams *et al.* (2010:5) suggests using the Kaiser-Meyer-Olkin Measure of Sampling Adequacy (KMO) and Bartlett's Test of Sphericity to assess the suitability of respondent data for factor analysis. The researchers state that "KMO index ranges from 0 to 1, with 0.50 considered suitable for factor analysis. The KMO index is recommended when the cases to variable ratio are less than 1:5. The Bartlett's Test of Sphericity should be significant ($p < .05$) for factor analysis to be suitable" (Williams *et al.*, 2010:5).

Although literature also refers to other factor analysis adequacy measures such as factorability of the correlation matrix (Williams *et al.*, 2010:5), this study primarily considered sample size, the Kaiser-Meyer-Olkin Measure of Sampling Adequacy (KMO), the Bartlett's Test of Sphericity and Determinants as suitable measures for assessing the adequacy of quantitative research data for factor analysis.

This study's sample size of 407 participants is more than the most common rule of thumb of 300 participants. Results of the sample size and correlations for Section A (Table 7-4) reflected that most KMO values ranged from 0.671 to 0.902. This reflected acceptable sample adequacy. Only one construct recorded a KMO lower than 0.6; the "Expose" construct recorded a value of 0.539. This value was higher than the required minimum of 0.5 considered suitable for factor analysis by Williams *et al.* (2010:5).

Bartlett's Test of Sphericity for Section A (Table 7-18) all reflected p-values <0,0001, which were less than 0.05. This indicated that correlations between the items were sufficient, so data was suitable for a factor analysis. Determinant values for Section A (Table 7-19) were all more than 0.00001, indicating the absence of multicollinearity (Yong & Pearce, 2013:88). Multicollinearity is described as a situation where intercorrelations among independent variables are very high. This can increase the variance of a regression coefficient and affect interpretability (Malhotra *et al.*, 2017:661). Section A's determination scores ranged between 0.009 and 0.609, indicating no severe multicollinearity.

Table 7-19: Results of the sample size and correlations - Section A

Construct name	KMO	Bartlett's Test	Determinant	Communalities (Extraction scores)	Total Variance Explained	Component Extracted
1. Expect - determine what customers expect from retail stores and attempt to satisfy customer expectations	0.861	< 0.0001	0.115	0.560 – 0.755	64.266	1
2. Expose - exposing customers visiting a retail store to physical proof that the retailer acknowledges and adheres to customer requirements and expectations	0.539	< 0.0001	0.609	0.194 – 0.752 Expose6 had a low score of 0.194 and will be reconsidered when the reliability is calculated.	56.505	1
3. Exciting - exciting (stimulating) customers with retail store window displays, store layouts and exhibits, products, prices, and promotions	0.899	< 0.0001	0.055	0.499 -0.705	63.372	1
4. Enter - focus on the reception of customers when they enter the store	0.819	< 0.0001	0.099	0.693 -0.778	75.169	1
5. Explore - enable customers to physically explore (walk around) the store freely, unhindered, and unrestricted	0.684	< 0.0001	0.354	0.683 -0.798	72.302	1
6. Experience - allow customers to physically experience (touch, feel, test) store products and offerings	0.671	< 0.0001	0.327	0.606 – 0.806	72.538	1
7. Engage - engage (connect with)_customers	0.902	< 0.0001	0.009	0.506 – 0.765	66.966	1

Construct name	KMO	Bartlett's Test	Determinant	Communalities (Extraction scores)	Total Variance Explained	Component Extracted
in a cordial, pleasant and professional manner						
8. Exchange - customer conversational exchanges during the customer in-store shopping journey	0.724	< 0.0001	0.311	0.730 – 0.756	75.184	1
9. Embrace - empower staff to invite, discuss, and embrace customer needs, requirements, opinions, and comments in customer engagement sessions	0.697	< 0.0001	0.285	0.670 – 0.814	75.307	1
10. Execute - focus on processes to effectively execute and conclude sales transactions	0.682	< 0.0001	0.298	0.644 – 0.820	74.261	1
11. Exit - focus on the processes associated with customers exiting the retail store	0.719	< 0.0001	0.216	0.733 -0.839	79.220	1
12. Enhance - focus on enhancing (improving) and constantly updating the retail store, improving service levels, change offerings as per customer requirements and expectations	0.697	< 0.0001	0.345	0.693 – 0.792	73.020	1

The KMO results for Section B of the questionnaire (Table 7-20) ranged from 0.500 to 0.726. All KMO values were equal or higher than 0.5 considered suitable for factor analysis as indicated by Williams *et al.* (2010:5). The Bartlett's Test of Sphericity p-values <0,0001, which were less than 0,05 indicated the data as suitable for factor analysis. Determinant scores for Section B ranged from between 0.193 and 0.634 indicating no severe multicollinearity affecting the interpretability of data.

Table 7-20: Results of the sample size and correlations - Section B

Construct name	KMO	Bartlett's Test	Determinant	Communalities (Extraction scores)	Total Variance Explained	Component Extracted
1. Customer experiences has a direct effect on customer engagement	0.682	< 0.0001	0.279	0.695 – 0.837	74.451	1

Construct name	KMO	Bartlett's Test	Determinant	Communalities (Extraction scores)	Total Variance Explained	Component Extracted
(to emotionally connect with customer)						
2. Customer experiences has a direct effect on customer satisfaction	0.726	< 0.0001	0.193	0.772 – 0.854	80.650	1
3. Customer engagement (emotional connecting with customer) has a direct effect on customer intentions and actions to re-visit retail stores (re-patronage, loyalty)	0.500	< 0.0001	0.634	0.802	80.248	1
4. Customer satisfaction has a direct effect on customer intentions and actions to re-visit retail stores (re-patronage, loyalty)	0.500	< 0.0001	0.526	0.844	84.407	1
5. Customer experiences have a direct effect on customer intentions and actions to re-visit retail stores (re-patronage, loyalty)	0.500	< 0.0001	0.532	0.842	84.212	1

7.4.2.4 Factor extraction

The second step in factor analysis, factor extraction, entailed reducing research data or variables to the smallest number of factors. The commonly used methods to extract factors, as identified by Auerswald and Moshagen (2019:4), Williams *et al.* (2010:6) and Henson and Roberts (2006:397) include Principal Components Analysis (PCA), Principal Axis Factoring (PAF), Kaiser-Guttman Criterion, Maximum Likelihood, Unweighted Least Squares, Generalised Least Squares, Alpha Factoring, and Image Factoring.

Henson and Roberts (2006:397) posit that PCA and PAF extraction are the most used methods. The default method in many statistical programs is PCA, specifically in EFA (Williams *et al.*, 2010:6). Researchers are encouraged by Gaskin and Happell (2014:514) to “appreciate the differences between these models and choose the one that is most suitable for their work”.

7.4.2.5 Criteria in determining factor extraction

Data extraction aims to reduce many items into factors to “produce scale unidimensionality and simplify the factor solutions” (Williams *et al.*, 2010:6). These factors should “give an adequate presentation of the observed covariances or correlations...when fitting an exploratory factor analysis model” (Everitt & Hothorn, 2011:142).

Extraction rules include Kaiser’s eigenvalues greater than one rule, Cattell’s scree test, Velicer’s minimum average partial (MAP) rule, Horn’s parallel analysis, the Hull method, the cumulative percentage of variance extracted and Ruscio and Roche’s comparison data (Costello and Osborne, 2005:2; Fabrigar *et al.*, 1999:278; Gaskin & Happell, 2014:514; Malhotra *et al.*, 2017:717; Williams *et al.*, 2010:6). Several researchers advise that factor extraction should not be based on one single criterion and suggest the concurrent use of multiple decision rules (Gaskin & Happell, 2014:514; Hair *et al.* (cited by Williams *et al.*, 2011:6); Henson & Roberts, 2006:399; Thompson & Daniel, 1996:200).

This study used multiple decision rules by applying the Social Sciences (SPSS) for Windows’ Principal Components extraction method. The measures used in this study include communalities, total variance explained, and components extracted as reflected in Tables 7-19 and 7-20:

- (a) Communalities (Extraction scores): The communality of a variable “represents the variance shared with the other variables via the common factors” (Everitt & Hothorn, 2011:139). It is described as “the variance of a measured variable that is explained by the construct on which it loads” (Malhotra *et al.*, 2017:805).

Communality scores should be at least 0.5 in samples of 200 or more (Malhotra *et al.*, 2017:805). However, for studies comprising more than five constructs, some measuring fewer than three indicators and sample sizes of at least 400, communalities of less than 0.5 is acceptable (Malhotra *et al.*, 2017:805). Mokoena (2020:119) in citing Pallant (2020), suggests that “communalities need to be at least 0.3”. Costello and Osborne (2005:4) suggest that “low to moderate communalities of 0.40 to 0.70” is an acceptable range for communalities.

Table 7-19 indicate that all Section A statements showed communalities higher than 0.5 except question Expose 6, which scored 0.194. Except for Question 6 (Expose), in all other cases, the extracted factors explain an adequate variance of the individual items.

Total variance explained: Yong and Pearce (2013:89) suggest that researchers consider the total variance explained as an indicator of the number of significant factors. Williams *et al.* (2010:6) state that no fixed threshold percentage exists for total variance explained. This statement is supported by Jollifi and Cadima (2016:4), who, in referring to the subjectiveness of a defined cut-off point, propose 70% as an acceptable norm. In citing Hair *et al.* and Pett *et al.* Williams *et al.* (2010:6) refer to different science-related rules of thumb and suggest that a cumulative variance explained of 50% to 60% is acceptable in social sciences. Even where low percentages of cumulative variance exist, the total variance remains a fundamental indicator to assess the dataset's quality (Jollifi & Cadima, 2016:4).

- (b) Total variance explained in Section A (Table 7-19) ranged between 56.5% and 75.1%. In Section B (Table 7-20), it ranged between 73.0% and 79.2%. This showed that the extracted factors for Sections A and B explain well above 50% of the total variance.

Components extracted: This study PCAs' results for Sections A and B (Tables 7-19 & 7-20) confirmed that only one construct per theoretical construct can be extracted and showed that "one component is strong enough to explain the variability in data" (Shoaib, 2020). Studies, where only one factor is extracted, do not require any factor rotation (Mokoena 2020:120).

7.4.2.6 Interpretation and labelling

The next step in factor analysis is to interpret the results (Everitt & Hothorn, 2011:88). The advantage of a PCA, as stated by Everitt and Hothorn (2011:89), is that it provides an informative view of multivariate data aiding interpretation as illustrated in Chapter 9 of this study.

7.4.3 Reliability

Reliability measures indicate if a questionnaire and its underlying factors consistently reflect what it is measured. If a researcher can replicate the results of a quantitative study, then it is regarded as a reliable study (Golafshani, 2003:599). Reliability thus suggests that applying the same method under the same circumstances can yield the same result (Middleton, 2023). It can be defined as "the extent to which a scale produces consistent results if repeated measurements are made on the characteristic" (Malhotra *et al.*, 2017:160).

Reliability as stated by Heale and Twycross (2005:67) possesses three attributes:

- **Homogeneity** (or internal consistency) - The extent to which all the items on a scale measure one construct.
- **Stability** - The consistency of results using an instrument with repeated testing
- **Equivalence** - Consistency among responses of multiple users of an instrument or among alternate forms of an instrument.

Several researchers (Heale & Twycross, 2005:67; Lozano *et al.*, 2008:73; Malhotra *et al.*, 2017:360; Straub *et al.*, 2004:13; Taherdoost, 2016:33) indicate that the Cronbach alpha test is the most used test to determine the internal consistency of an instrument. Boudreau (2001:7) suggests that 79% of “studies assessing the reliability of their instruments have done so through the standard coefficient of internal consistency, i.e., Cronbach”.

This study acknowledged the ranges of reliability values as suggested by Fong *et al.* (2018:38) (citing Cooper and Schindler, Hinton *et al.* and Cohen *et al.*). Tommasi *et al.* (2018:67) also support these value ranges (in citing Kline) as indicated in Table 7-21. This study used the range indicating values equal to and above 0.6 as acceptable. Once reliability had been determined, construct scores were calculated by taking the average of the items within each construct.

Table 7-21: Cronbach’s Alpha cut-off points for reliability

Indicator	Cooper and Schindler (2003) cited by Fong <i>et al.</i> (2018)	Hinton <i>et al.</i> (2004) cited by Fong <i>et al.</i> (2018)	Cohen <i>et al.</i> (2007) cited by Fong <i>et al.</i> (2018)	Kline (2000) cited by Tommasi <i>et al.</i> (2018)
Very high/excellent	$\alpha \geq 0.9$	$\alpha \geq 0.9$		
High/Good	$0.7 \leq \alpha < 0.9$	$0.7 \leq \alpha < 0.9$	$0.7 \leq \alpha < 0.8$	
Moderate/acceptable	$0.6 \leq \alpha < 0.7$	$0.5 \leq \alpha < 0.7$	$0.6 \leq \alpha < 0.7$	$0.6 \leq \alpha < 0.7$
Poor/Low	$0.5 \leq \alpha < 0.6$	$\alpha < 0.5$	$\alpha < 0.6$	$0.5 \leq \alpha < 0.6$
Unacceptable/Very low	$\alpha < 0.5$			$\alpha < 0.5$

Source: Adapted from Fong *et al.* (2018:38) & Tommasi *et al.* (2018:67)

As indicated in Tables 7-21 and 7-22, the Cronbach alpha coefficients for study constructs ranged between 0.748 and 0.916, which signified acceptable reliability of constructs. Questions related to the Expose construct in Section A initially indicated a Cronbach Alpha level of 0.519 due to the impact of Question 6. This question was reconsidered and omitted due to its negative effect on the Cronbach alpha.

The means of the construct scores of Section A (Retail customer-centric experience management model) ranged between 4.11 and 4.54, and those of Section B (Impact of good and satisfying customer experiences) ranged between 4.31 and 4.46.

In more than two-thirds of the constructs in Section A, respondents strongly agreed with the statements associated with each construct. The 'Execute' construct registered the highest mean score of 4.54 (SD = 0.59). The other constructs in Section A, namely the Expose, Experience, Exit and Enhance constructs, the respondents, on average, tended to agree with statements associated with the constructs.

For Section B, the respondents indicated that they, on average, strongly agreed with the statements associated with each construct. The lowest construct mean score (4.31; SD = 0.68) was registered against the construct related to the impact of customer experience on the level of a customer's engagement with a retail entity.

Table 7-22: Reliability and descriptive statistics of construct scores - Section A

Constructs	Questions	Cronbach's Alpha	Mean	Standard Deviation
Expect	1-5	0.858	4.41	0.67
Expose	7-8	0.748	4.11	0.76
Excite	9-11	0.880	4.36	0.64
Enter	12-15	0.888	4.35	0.69
Explore	16-18	0.804	4.36	0.66
Experience	19-21	0.802	4.22	0.70
Engage	22-24	0.916	4.50	0.58
Exchange	25-27	0.833	4.52	0.60
Embrace	28-30	0.832	4.43	0.61
Execute	31-33	0.816	4.54	0.59
Exit	34-36	0.868	4.27	0.70
Enhance	37-39	0.811	4.23	0.67

Table 7-23: Reliability and descriptive statistics of construct scores- Section B

Constructs	Questions	Cronbach's Alpha	Mean	Standard Deviation
Customer Experience impact on Customer Engagement	40-42	0.834	4.31	0.68
Customer Experience impact on Customer Satisfaction	43-45	0.878	4.46	0.63
Customer Engagement impact on Customer Re-patronage	46-47	0.748	4.34	0.72
Customer Satisfaction impact on Customer Re-patronage	48-49	0.813	4.48	0.67
Customer Experience impact on Customer Re-patronage	50-51	0.812	4.45	0.63

7.4.4 Descriptive statistics for gender

Malhotra et al. (2017:581) state that an independent samples t-test compares the means of two independent groups to determine if statistical evidence exists that the associated population means differ significantly. Though t-tests were performed, the primary focus was on effect sizes for the differences in means between male and female respondents calculated (Tables 7-24 & 7-25) to establish if there are significant differences in means of the two groups.

This study utilised purposive or judgmental sampling, a form of convenience sampling, to select respondents. The p-values and their interpretation are important in random sampling and convenient sampling studies. They are reported for completeness but not interpreted because the effect size was used to measure practical significant differences (Ellis & Steyn, 2003:51; Thompson & Daniel, 1996:202). This study used guideline effect size values (no cut-offs) for interpretations. As Cohen (cited by Steyn, 2000:1) suggested, an effect size of 0.2 to 0.5 has a small practical effect and is considered practically insignificant. An effect size between 0.5 and 0.8 has a medium effect and has a detectable practical effect that might point towards practical significance, while effect sizes larger than 0.8 have a large effect which is practically significant and therefore of practical importance”.

Table 7-24: Mean comparisons between male and female respondents - Section A

Construct	Male		Female		p-value	t- value	Effect size
	Mean	SD	Mean	SD			
Expect	4,38	0,74	4,42	0,64	0,638	-0,472	0,05
Expose	4,11	0,80	4,12	0,74	0,904	-0,121	0,01
Excite	4,31	0,67	4,38	0,63	0,334	-0,968	0,10
Enter	4,29	0,73	4,37	0,68	0,357	-0,951	0,10
Explore	4,32	0,61	4,37	0,67	0,481	-0,705	0,07
Experience	4,21	0,64	4,23	0,73	0,757	-0,309	0,03
Engage	4,51	0,53	4,50	0,60	0,880	0,151	0,02
Exchange	4,50	0,57	4,52	0,62	0,770	-0,293	0,03
Embrace	4,43	0,55	4,44	0,63	0,881	-0,150	0,02
Execute	4,51	0,61	4,56	0,58	0,436	-0,781	0,08
Exit	4,30	0,73	4,26	0,69	0,653	0,450	0,05
Enhance	4,19	0,67	4,24	0,67	0,501	-0,674	0,07

Table 7-25: Mean comparisons between male and female respondents - Section B

Construct	Male		Female		p-value	t- value	Effect size
	Mean	SD	Mean	SD			
Cust Exp impact on Cust Eng	4,33	0,66	4,30	0,69	0,615	0,504	0,05
Cust Exp impact on Cust Satis	4,43	0,65	4,47	0,62	0,617	-0,501	0,05
Cust Eng impact on Cust Repat	4,32	0,75	4,35	0,70	0,660	-0,441	0,05
Cust Satis impact on Cust Repat	4,44	0,67	4,49	0,67	0,552	-0,596	0,07
Cust Exp impact on Cust Repat	4,41	0,61	4,46	0,64	0,461	-0,739	0,08

In considering the reported effect sizes ($d=0.01 - 0.10$) for Section A of the study (Table 7-24) and the effect sizes ($d=0.05 - 0.08$) for Section B of the study (Table 7-25), there are no

practically significant differences in the means of the Male vs. Female respondents. The results reflected that there was thus no practically significant difference in male and female respondents' assessments of customer journey experience factors that should be considered in designing and implementing a customer-centric experience management framework (Section A). There is also no practically significant difference in male and female respondents' assessments of the impact of a customer having a pleasant and fruitful customer retail experience.

7.4.5 Descriptive statistics and ANOVA (Analysis of variance)

This study utilised a one-way Analysis of Variance (one-way ANOVA) defined as “an ANOVA technique in which there is only one factor where a factor refers to a categorical independent variable in ANOVA” (Malhotra *et al.*, 2017:604). This technique tested the presence of any statistical differences between the means of three or more independent groups and is a method “to find out if survey or experiment results are significant” (Glen, 2023).

T-values and p-values are reported in ANOVA tables for completeness. ANOVA interpretations will be based on effect sizes using guideline values (not cut-offs) to report practical significant differences between mean and effect sizes.

ANOVA results were obtained for five groups: age, education level, home language, profession, and geographic location groups. The ANOVA results for age, educational level and geographical location groups all reported no practically visible or practically significant differences in the respected groups and will not be discussed but can be viewed in Appendix C.1 to C.3. The results for the home language group and profession group only are discussed in the next section.

7.4.5.1 Descriptive statistics for home language

The descriptive table for home language is illustrated in Table 7-26 and includes measures such as the Mean, Standard Deviation, Anova and Welch p-values and Effect Size.

Table 7-26: ANOVA results of the home language group comparisons

					Effect Size		
Home language	Mean	Standard deviation	Anova p-values	Welch p-values	Afrikaans with...	English with...	isiZulu with...
SECTION A							
Expect							
Afrikaans	4.43	0.46	0.381	0.419			
English	4.35	0.78			0.11		
isiZulu	4.45	0.82			0.02	0.12	
Other	4.50	0.62			0.11	0.20	0.06
TOTAL	4.41	0.67					
Expose							
Afrikaans	4.23	0.55	0.139	0.099			
English	4.04	0.86			0.21		
isiZulu	4.25	0.85			0.03	0.24	
Other	4.06	0.74			0.22	0.02	0.22
TOTAL	4.12	0.76					
Excite							
Afrikaans	4.34	0.48	0.592	0.548			
English	4.33	0.73			0.01		
isiZulu	4.37	0.80			0.03	0.04	
Other	4.45	0.60			0.18	0.16	0.10
TOTAL	4.36	0.65					
Enter							
Afrikaans	4.27	0.55	0.155	0.138			
English	4.32	0.75			0.07		
isiZulu	4.48	0.88			0.23	0.17	
Other	4.48	0.68			0.30	0.21	0.01
TOTAL	4.35	0.70					
Explore							
Afrikaans	4.38	0.46	0.468	0.516			
English	4.32	0.74			0.09		
isiZulu	4.29	0.85			0.11	0.04	
Other	4.45	0.65			0.10	0.18	0.19
TOTAL	4.36	0.66					

					Effect Size		
Home language	Mean	Standard deviation	Anova p-values	Welch p-values	Afrikaans with...	English with...	isiZulu with...
Experience							
Afrikaans	4.22	0.58	0.942	0.955			
English	4.21	0.75			0.01		
isiZulu	4.17	0.87			0.06	0.05	
Other	4.26	0.71			0.05	0.06	0.10
TOTAL	4.22	0.70					
Engage							
Afrikaans	4.55	0.41	0.110	0.106			
English	4.45	0.67			0.14		
isiZulu	4.38	0.82			0.20	0.09	
Other	4.61	0.43			0.16	0.24	0.28
TOTAL	4.50	0.58					
Exchange							
Afrikaans	4.58	0.42	0.230	0.264			
English	4.47	0.69			0.16		
isiZulu	4.38	0.85			0.24	0.11	
Other	4.56	0.50			0.04	0.13	0.22
TOTAL	4.52	0.61					
Embrace							
Afrikaans	4.41	0.53	0.476	0.374			
English	4.41	0.65			0.01		
isiZulu	4.41	0.78			0.01	0.00	
Other	4.53	0.52			0.24	0.19	0.16
TOTAL	4.43	0.61					
Execute							
Afrikaans	4.63	0.43	0.053	0.103			
English	4.53	0.65			0.15		
isiZulu	4.30	0.83			0.39	0.27	
Other	4.54	0.52			0.18	0.01	0.28
TOTAL	4.54	0.59					
Exit							
Afrikaans	4.19	0.63	0.232	0.190			

					Effect Size		
Home language	Mean	Standard deviation	Anova p-values	Welch p-values	Afrikaans with...	English with...	isiZulu with...
English	4.26	0.74			0.10		
isiZulu	4.30	0.83			0.13	0.04	
Other	4.41	0.67			0.32	0.19	0.13
TOTAL	4.27	0.70					
Enhance							
Afrikaans	4.16	0.58	0.119	0.062			
English	4.22	0.72			0.08		
isiZulu	4.13	0.90			0.03	0.09	
Other	4.38	0.56			0.39	0.23	0.28
TOTAL	4.22	0.67					
SECTION B							
Customer experience – customer engagement							
Afrikaans	4.28	0.61	0.192	0.078			
English	4.28	0.74			0.00		
isiZulu	4.22	0.92			0.06	0.06	
Other	4.46	0.50			0.30	0.25	0.26
TOTAL	4.31	0.68					
Customer experience – customer satisfaction							
Afrikaans	4.41	0.51	0.515	0.385			
English	4.46	0.71			0.07		
isiZulu	4.39	0.77			0.03	0.09	
Other	4.54	0.52			0.25	0.11	0.20
TOTAL	4.46	0.63					
Customer engagement – customer intent (re-patronage)							
Afrikaans	4.31	0.64	0.534	0.603			
English	4.35	0.74			0.06		
isiZulu	4.20	0.89			0.12	0.17	
Other	4.41	0.70			0.15	0.08	0.24
TOTAL	4.34	0.72					
Customer satisfaction – customer intent (re-patronage)							
Afrikaans	4.52	0.48	0.630	0.617			
English	4.43	0.76			0.12		

					Effect Size		
Home language	Mean	Standard deviation	Anova p-values	Welch p-values	Afrikaans with...	English with...	isiZulu with...
isiZulu	4.43	0.85			0.10	0.00	
Other	4.52	0.62			0.00	0.12	0.10
TOTAL	4.48	0.67					
Customer experience – customer intent (re-patronage)							
Afrikaans	4.43	0.52	0.678	0.601			
English	4.42	0.72			0.01		
isiZulu	4.43	0.67			0.01	0.01	
Other	4.53	0.55			0.18	0.14	0.14
TOTAL	4.45	0.63					

On average, the isiZulu and the Afrikaans language groups agreed and strongly agreed with Section A's statements regarding the 'Execute' construct. However, the effect size of 0.39 for isiZulu versus Afrikaans leaned towards practically visible or practically significant differences of opinion between isiZulu and Afrikaans respondents regarding whether retail management should focus on processes to execute and conclude sales transactions effectively.

The effect size of 0.39 for Other versus Afrikaans language groups under the 'Enhance' construct in Section A (Table 7-26) also leaned towards practically visible or practically significant differences of opinion between these two language groups. These differences of opinion relate to retail management's focus on enhancing (improving) and constantly updating the retail store, improving service levels, and changing offerings per customer requirements and expectations.

Effect sizes for Section B (Table 7-26) indicated that no practically visible or practically significant differences were reported for the analyses based on Language groups.

7.4.5.2 Descriptive statistics for professions

The descriptive table for professions is illustrated in Table 7-27 and includes measures such as the Mean, Standard Deviation, Anova and Welch p-values, and Effect Size.

Table 7-27: ANOVA results of the professions group comparisons

					Effect Size		
Profession	Mean	Standard deviation	Anova p-values	Welch p-values	Profes-sional with...	Admini-strative with...	Home-maker. etc. with...
SECTION A							
Expect							
Professional	4.43	0.66	0.664	0.769			
Administrative	4.46	0.80			0.04		
Homemaker. Pensioner. Student. Unemployed	4.42	0.40			0.01	0.05	
Other	4.33	0.81			0.11	0.15	0.10
TOTAL	4.41	0.67					
Expose							
Professional	4.05	0.75	0.092	0.027			
Administrative	4.08	0.86			0.03		
Homemaker. Pensioner. Student. Unemployed	4.28	0.56			0.31	0.24	
Other	4.07	0.86			0.02	0.01	0.25
TOTAL	4.11	0.76					
Excite							
Professional	4.36	0.62	0.770	0.840			
Administrative	4.42	0.83			0.08		
Homemaker. Pensioner. Student. Unemployed	4.37	0.49			0.02	0.06	
Other	4.31	0.70			0.07	0.13	0.09
TOTAL	4.36	0.64					
Enter							
Professional	4.35	0.62	0.701	0.807			
Administrative	4.41	0.82			0.07		

					Effect Size		
Profession	Mean	Standard deviation	Anova p-values	Welch p-values	Profes- sional with...	Admini- strative with...	Home- maker. etc. with...
Homemaker. Pensioner. Student. Unemployed	4.36	0.53			0.02	0.06	
Other	4.28	0.87			0.08	0.15	0.10
TOTAL	4.35	0.69					
Explore							
Professional	4.33	0.60	0.585	0.448			
Administrative	4.35	0.88			0.02		
Homemaker. Pensioner. Student. Unemployed	4.44	0.53			0.18	0.10	
Other	4.33	0.71			0.00	0.02	0.15
TOTAL	4.36	0.66					
Experience							
Professional	4.31	0.60	0.008	0.014			
Administrative	4.13	0.87			0.22		
Homemaker. Pensioner. Student. Unemployed	4.31	0.64			0.01	0.21	
Other	4.04	0.77			0.36	0.10	0.35
TOTAL	4.22	0.70					
Engage							
Professional	4.52	0.51	0.143	0.126			
Administrative	4.40	0.82			0.15		
Homemaker. Pensioner. Student. Unemployed	4.59	0.38			0.14	0.24	
Other	4.44	0.67			0.12	0.05	0.23
TOTAL	4.50	0.58					
Exchange							
Professional	4.57	0.55	0.161	0.232			

					Effect Size		
Profession	Mean	Standard deviation	Anova p-values	Welch p-values	Profes-sional with...	Admini-strative with...	Home-maker. etc. with...
Administrative	4.42	0.77			0.20		
Homemaker. Pensioner. Student. Unemployed	4.57	0.45			0.00	0.20	
Other	4.44	0.71			0.19	0.02	0.19
TOTAL	4.52	0.60					
Embrace							
Professional	4.43	0.57	0.799	0.789			
Administrative	4.39	0.80			0.05		
Homemaker. Pensioner. Student. Unemployed	4.48	0.51			0.08	0.11	
Other	4.41	0.61			0.04	0.03	0.11
TOTAL	4.43	0.61					
Execute							
Professional	4.59	0.55	0.002	0.002			
Administrative	4.48	0.73			0.16		
Homemaker. Pensioner. Student. Unemployed	4.67	0.38			0.15	0.27	
Other	4.37	0.69			0.32	0.14	0.44
TOTAL	4.54	0.59					
Exit							
Professional	4.31	0.70	0.501	0.562			
Administrative	4.16	0.80			0.19		
Homemaker. Pensioner. Student. Unemployed	4.31	0.58			0.01	0.18	
Other	4.24	0.76			0.10	0.10	0.09
TOTAL	4.27	0.70					
Enhance							

					Effect Size		
Profession	Mean	Standard deviation	Anova p-values	Welch p-values	Profes-sional with...	Admini-strative with...	Home-maker. etc. with...
Professional	4.22	0.65	0.436	0.423			
Administrative	4.25	0.76			0.04		
Homemaker. Pensioner. Student. Unemployed	4.30	0.57			0.12	0.06	
Other	4.14	0.73			0.11	0.15	0.22
TOTAL	4.23	0.67					
SECTION B							
Customer experience – customer engagement							
Professional	4.32	0.64	0.732	0.799			
Administrative	4.22	0.81			0.12		
Homemaker. Pensioner. Student. Unemployed	4.30	0.63			0.04	0.09	
Other	4.35	0.70			0.04	0.15	0.07
TOTAL	4.31	0.68					
Customer experience – customer satisfaction							
Professional	4.49	0.58	0.866	0.884			
Administrative	4.41	0.76			0.09		
Homemaker. Pensioner. Student. Unemployed	4.45	0.50			0.05	0.05	
Other	4.43	0.73			0.07	0.02	0.03
TOTAL	4.46	0.63					
Customer engagement – customer intent (re-patronage)							
Professional	4.39	0.64	0.479	0.526			
Administrative	4.27	0.78			0.16		
Homemaker. Pensioner. Student. Unemployed	4.37	0.66			0.03	0.13	
Other	4.27	0.83			0.15	0.00	0.12

					Effect Size		
Profession	Mean	Standard deviation	Anova p-values	Welch p-values	Profes-sional with...	Admini-strative with...	Home-maker. etc. with...
TOTAL	4.34	0.72					
Customer satisfaction – customer intent (re-patronage)							
Professional	4.50	0.61	0.398	0.544			
Administrative	4.51	0.75			0.01		
Homemaker. Pensioner. Student. Unemployed	4.52	0.49			0.03	0.01	
Other	4.37	0.85			0.15	0.16	0.17
TOTAL	4.48	0.67					
Customer experience – customer intent (re-patronage)							
Professional	4.44	0.58	0.939	0.933			
Administrative	4.43	0.72			0.02		
Homemaker. Pensioner. Student. Unemployed	4.48	0.56			0.06	0.07	
Other	4.43	0.71			0.02	0.01	0.08
TOTAL	4.45	0.63					

The ‘Execute’ construct reflected the largest effect size in Section A (Table 7-27) of 0.44 for the Other professions group versus the Homemakers, Pensioners, Students and Unemployed group. Although these two professions group, on average, agreed with the Execute statements, the effect size leaned towards practically visible or practically significant differences in opinions between these two professions groups regarding retail management’s focus on processes to execute and conclude sales transactions effectively.

Effect sizes for Section B (Table 7-27) indicated that no practically visible or practically significant differences were reported for the analyses based on Professions groups.

The reliability of the variables was confirmed by calculating Cronbach alpha coefficients. It was also established that most of the means of construct scores showed, on average, strong agreements with statements associated with constructs. These analyses and the results of ANOVA’s indicate no significant differences between the respective groups.

The next session discusses findings related to the Structural Equation Modelling process followed to examine the structural relationship between consequence constructs associated with customer experience.

7.5 QUANTITATIVE STUDY FINDINGS (STRUCTURAL EQUATION MODEL)

A Structural Equation Model (SEM) is a confirmatory tool, and it is used to “establish the validity of a certain model rather than to “discover” an appropriate model (Swanson & Holton, 2005:144). It determines how well a proposed theory explains the observed covariance matrix among measured variables (Malhotra *et al.*, 2017:802). Yuan (2005:115) posits that “model evaluation is one of the most important aspects” of SEM. Hooper *et al.* (2008:53) refer to SEM as a technique to determine how well the data fits the specified.

The formulation of the SEM was based on a process that included defining individual constructs, specifying the measurement model, assessing the reliability and validity of the measurement model, specifying the structural model, assessing structural model validity, and the formulation of conclusions and recommendations if the structural model is valid (Malhotra *et al.* 2017:802).

Researchers are advised by Malhotra *et al.* (2017:805) that a SEM model should be estimated on an adequate sample size. For stable solutions, a study with more than five constructs, each measured by less than three indicators with multiple low (less than 0.5) communalities, should require a sample size more than 400. (Malhotra *et al.*, 2017:805). The SEM model in this study is estimated to have a sample size of 407.

7.5.1 Structural Equation Model (SEM) analysis

The SEM analysis is not based on raw data but on a covariance matrix that provides more detailed information and flexibility (Malhotra *et al.*, 2017:802). AMOS software generated covariances that formed the basis of this study’s SEM analysis.

The covariance matrix between the observed variables was estimated based on the proposed structural and measurement model. This was followed by how the model that best represents the data reflects the underlying theory through a process of model fit (Hooper *et al.*, 2008:53). Model fit is determined by comparing how closely the estimated covariance matrix matched the observed (sample) covariance matrix (Malhotra *et al.*, 2017:805).

Malhotra *et al.* (2017:805) state that measurement model validity depends on the goodness-of-fit results, composite reliability, and construct validity. The goodness of fit refers to how well the specified model reproduces the covariance matrix among the indicator items. How similar is the

estimated covariance of the indicator variables to the observed covariance in the sample data. The closer the values of the two matrices are to each other, the better the model is said to fit.

7.5.2 Model fit indices

Model fit is assessed using absolute, incremental and parsimony fit indices. Hooper *et al.* (2008:53) indicate that absolute fit indices provide the most fundamental indication of how well the proposed theory fits the data. Incremental fit indices are used when comparisons with a baseline model are required, while absolute indices measure how well the model fits in comparison to no other model (Malhotra *et al.*, 2017:805; Hooper *et al.*, 2008:53). Parsimony fit indices are useful in evaluating competing models and used in cases of highly saturated and complex models where the estimation process is dependent on the sample data (Hooper *et al.*, 2008:54; Malhotra *et al.*, 2017:806;).

These indices are used to establish whether the data fits the proposed model (Swanson & Holton, 2005:148). This study used a variety of indices but focussed primarily on absolute indices as no baseline or competing model exists, and the proposed model is of low complexity.

7.5.3 Evaluating Model Fit

Following the model specification from theory and parameter estimations, fit estimates were derived from fit indices calculations reflecting “the difference between the sample covariance used to obtain the parameter estimates and a predicted covariance matrix based on the parameter estimates” (Swanson & Holton, 2005:148). Fit indices thus indicate “how well the specified model fits the observed or sample data” (Malhotra *et al.*, 2017:806).

Hooper *et al.* (2008:56) state that although no golden rule exists for assessing model fit, it is good practice to use a variety of indices as such indices can reflect different aspects of model fit. Crowley and Fan (1997:516) suggest that fit information from three sources could be synthesised to judge model fit reasonably. The study considered model fit based on three different fit indices (Blunch, 2012:111):

1. **Absolute fit measure** – The ratio of the chi-square to the degrees of freedom (CMIN/DF). March and Hocevar (1985:567) suggest that ratios as low as 2 or as high as 5 indicate a reasonable fit.
2. **Relative fit measure** – The comparative fit index (CFI). Several researchers indicate that a value of 0.9 or larger indicates a good to an adequate to a reasonable model fit (Hooper *et al.*, 2008:55; Malhotra *et al.*, 2017:807; Yuan, 2005:142). Other researchers (Blunch,

2012:115; Hooper *et al.*, 2008:55; Swanson & Holton, 2005:148) suggest that values larger or equal to 0.95 can be considered a good fit. In considering different views on fit statistics, Crowley and Fan (1997:522) state that there is “no absolute value with which one can state that the fit is acceptable”. They suggest that values larger than 0.9 generally reflect acceptable model fit.

3. **Fit measures based on non-central chi-square distribution** - Root mean square error of approximation (RMSEA) measures the difference between the actual and the predicted covariance. Malhotra *et al.* (2017:807) state that an RMSEA value of ≤ 0.08 is considered conservative, as lower values suggest a good model fit. MacCallum *et al.* (1996:134) believe that values larger than 0.10 are considered poor, values between 0.08 and 0.1 as borderline, from 0.05 to 0.08 are acceptable, and values ≤ 0.05 are excellent. Blunch (2012:116) posits that values around 0.05 can be considered a good fit and that values in excess of 0.10 should not be acceptable.

7.5.4 SEM results: relationship between Customer Experience and Repatronage mediated by Satisfaction and Engagement

The model with the relationship between Customer Experience and Repatronage mediated by Satisfaction and Engagement is illustrated in Figure 7-2. Shao *et al.* (2022:1) state that “understanding the association between theoretical constructs is at the heart of quantitative research” and that the relationship between variables is usually obtained by assessing how measures/scales that represent the variables are correlated (Shao *et al.*, 2022:2).

Gunzler *et al.* (2013:390) maintain that path diagrams best represent SEM models. A path diagram consists of nodes representing the variables and arrows showing relations among these variables. Arrows are used generally to represent relationships among the variables. A single straight arrow indicates a causal relation from the base of the arrow to the head of the arrow.

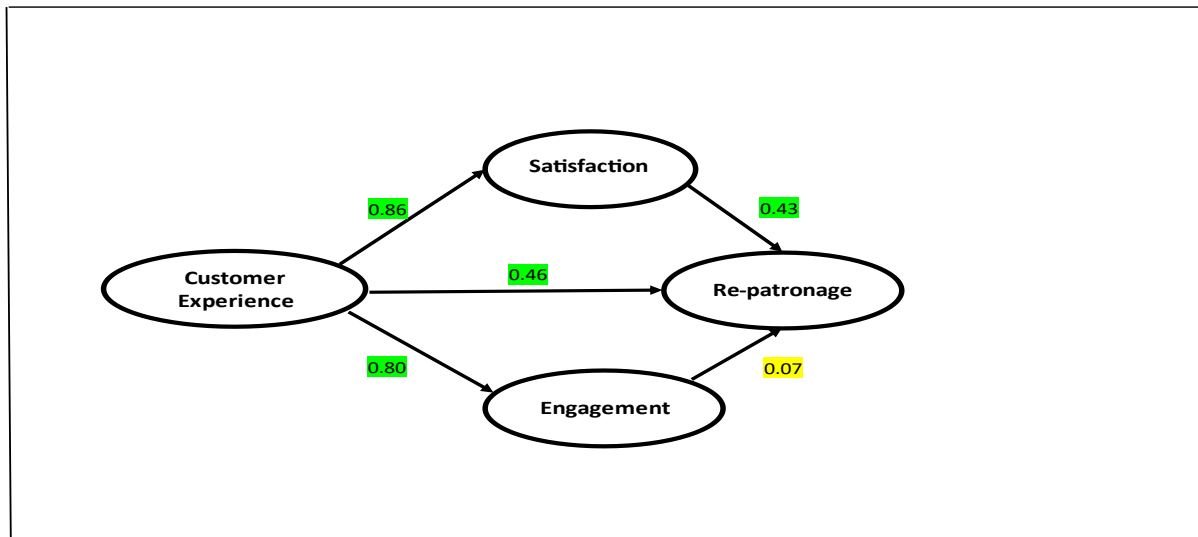


Figure 7-2: Relationship between Customer Experience and Repatronage mediated by Satisfaction and Engagement

The SEM results based on the analysis in AMOS indicated that all the paths are statistically significant (p-values <0.001) except for Engagement to Repatronage (p-value = 0.251). This is also confirmed by the standardised path coefficients (patronage = 0.07), an indication of the strength of the contribution. Though a standard path coefficient of 0.07 can be regarded as low Huber *et al.* (cited by Mohamed *et al.*, 2018:2) indicate that “path coefficients should exceed 0.100 to account for a certain impact within the model and be significant at least at the 0.05 level”.

The model explained 85.8% of the variation within the data, and the percentage of mediation was 48.21%. Considering the fit indices, the CMIN/DF measured 4,334, within the 0.2 and 0.5 ranges regarded as a reasonable fit. The CFI indices measured 0.895, indicating a reasonable fit, and the RMSEA was at 0.091, with a confidence interval of 90% [0.085, 0.096], reflecting a borderline fit. It can be concluded that the indices results confirm a reasonable model fit.

7.5.5 Alternate SEM results: relationship between Customer Experience and Repatronage mediated only by Satisfaction

Given the borderline value (0.07) associated with the mediation through Engagement, a revised model was fitted to the data. In this case, the mediation through the Engagement path was omitted from the model. The revised measurement model without the ‘Engagement’ construct is reflected in Figure 7.3.

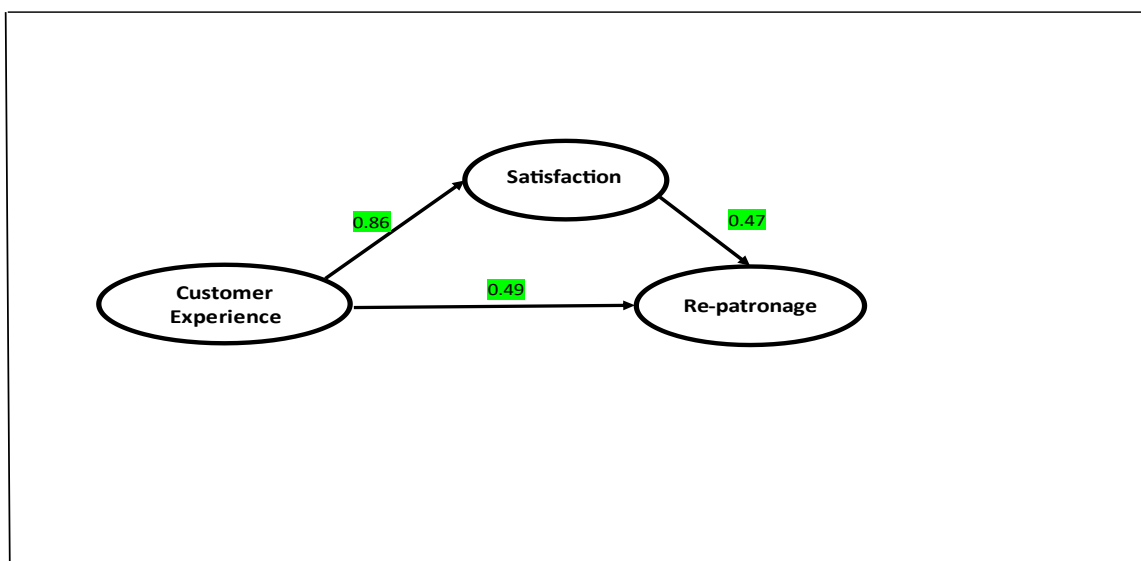


Figure 7-3: Relationship between Customer Experience and Repatronage mediated only by Satisfaction

In the second iteration, all the paths were reported to be statistically significant (p -values < 0.001) and the standardised path coefficients ranged between (0.47 – 0.86). This model explained 85.5% of the variation within the data, and the percentage of mediation was 45.24%. The revised model yielded marginally weaker indices: a CMIN/DF of 4,744, a CFI of 0.898, and RMSEA of 0.096.

7.5.6 SEM comparisons

Indices applicable to the original and revised models are contained in Table 7.28.

Table 7-28: Indices, original versus revised SEM

Indicator	Rule of thumb	Original model	Revised model
Variance explained		85.8%	85.5%
% mediation		48,2%	45,2%
Fix indexes:			
CMIN/DF	≤ 5 = reasonable fit	4,334	4,744
CFI	≥ 0.90 = acceptable fit	0,895	0,898
RMSEA	> 0.10 = not acceptable		
RMSEA 90%		0,085 – 0,096	0,090 – 0,102
Standard path coefficients		0,43 – 0,86	0,47 – 0,86

Though the revised SEM, which excludes the mediation effect of Engagement on re-patronage, shows that all paths were statistically significant (p -values <0.001) and registered standardised path coefficients ranged between (0.47 – 0.86), the rest of the indices performed weaker than the original model (Table 7-28) resulting into a bias towards the original model.

Marketing research studies place a high premium on the relationship between customer engagement and loyalty (a proxy for re-patronage) and other customer experience variables. Several studies (Baker *et al.*, 2002:129; Kasper, 1995:315; La Fleur, 2023; Mohd-Ramly & Omar, 2017:1151; So *et al.*, 2016:64;) confirmed the positive impact of Engagement on customers' re-patronage behaviour.

Perceptions and opinions of the relationship between customer engagement and customer re-patronage intentions were also surveyed in the qualitative study among retail managers and training specialists (Question 15.17, paragraph 8.3.4.5) for triangulation purposes.

7.6 SUMMARY OF QUANTITATIVE STUDY FINDINGS

Cronbach alpha internal consistency test showed that Sections A and B of the quantitative survey possess satisfactory reliability and that the research instrument collected acceptable data (Cronbach alpha coefficients exceeded 0.6). This signified acceptable reliability of constructs and confirmed the reliability attributes of homogeneity, stability, and equivalence as defined Heale and Twycross (2005:67).

The study's EFA considered sample size, the Kaiser-Meyer-Olkin Measure of Sampling Adequacy (KMO) and Bartlett's Test of Sphericity as suitable measures for assessing the adequacy of quantitative research data for factor analysis.

The study's sample size of 407 participants was more than the rule of thumb of 300 participants. Most KMO values for Section A (Table 7-19) ranged from 0.539 to 0.902. KMO values for Section B (Table 7-20) ranged from between 0.500 and 0.726. These values were equal or higher than the minimum of 0.5, considered suitable for factor analysis (Williams *et al.*, 2010:5) and acceptable sample adequacy. Bartlett's Test of Sphericity reflected p -values <0.0001 (Tables 7-19 & 7-20), which were less than 0.05, indicating that correlations in Section A and Section B were significant and, therefore, data was suitable for a factor analysis.

The demographics of the study's researched sample, as recorded in Section C of the quantitative questionnaire and reflected in Table 7-1, indicated a 71% male and 29% female composition. Most respondents (53%) fell into the 26-to-35-years and 36-to-45-years age

groups. Respondents' level of education was post-graduate at 32%, secondary, certificate, and undergraduate, each comprising around 20%.

The sample's home language representation consisted of English 44%, Afrikaans 30% and South African official languages 26%. Some 39% of sample respondents were in a professional occupation, while 14% indicated an administrative profession, followed by pensioners (10%), homemakers (6 %), unemployed (5%) and 17% a variety of other professions. Most of the respondents originated from Gauteng (54%), Western Cape (19%) and KwaZulu Natal (15%).

The responses to Section A (proposed twelve experience constructs associated with a retail store customer journey) and Section B (impact of customer retail experiences) were summarised in Paragraphs 7.4.1.2.1 and 7.4.1.2.2, respectively. In assessing Section A detail responses (Tables 7-2 to 7-13), it revealed that more than 88% of respondents, on average, tended to agree and strongly agree that retail tactics associated with the twelve customer experience constructs can have a positive influence on a customer's overall shopping experience. This was also evident in the mean scores per construct, which varied between 4,11 and 4,45, and the standard deviations, which varied between 0,58 and 0,70. These agreements cut across all sample age, level of education, home language, profession, and geographical location groups.

In assessing Section B (impact of customer retail experiences) responses (Tables 7-14 to 7-18), more than 91% of respondents (Mean = 4,31 to 4,46 and SD = 0,63 to 0,68) on average tended to agree and strongly agree that customer experience has an impact on customer engagement, customer satisfaction and customer re-patronage. On average, more than 93% of respondents (Mean = 4,34, SD = 0,72) tended to agree and strongly agree that customer engagement impacts customer patronage. More than 95% of respondents (Mean = 4,48, SD = 0,67), on average, tended to agree and strongly agree that customer satisfaction impacts customer patronage. These agreements cut across all ages, education levels, home languages, professions, and geographical location groups.

The guidelines, as suggested by Cohen (cited by Steyn, 2000:1), were used in assessing ANOVA's. The majority of means of construct scores showed, on average, strong agreements with statements associated with constructs. From these analyses and the results of ANOVA's indicating practical no significant differences exist in respective groups

Structural Equation Modelling (SEM) was used to examine the structural (causal) relationship between customer experience, customer satisfaction, customer engagement and customer re-patronage behaviour where customer satisfaction and customer engagement acted as mediators.

The structural relationship between Customer Experience and Repatronage mediated by Satisfaction and Engagement resulted in acceptable indices. However, Engagement as a mediator was statistically insignificant. A second SEM, without Engagement as mediator, resulted in statistically significant paths and marginally better path coefficients than the original model. The revised model yielded marginally weaker fit indices than the original model.

The next chapter discusses the results of the secondary phase of the sequential explanatory mixed-method study, the qualitative study. The qualitative study surveyed the views of retail store management and training specialists regarding the proposed conceptual experience management framework.

CHAPTER 8 QUALITATIVE RESEARCH RESULTS

8.1 INTRODUCTION

The preceding chapter provided the findings of the quantitative phase of the sequential explanatory mixed-method study. The quantitative study was conducted among active retail customers to test the applicability, validity, efficacy, and impact of twelve key constructs associated with the conceptual customer experience management framework.

This chapter discusses the findings of the qualitative phase of the sequential explanatory mixed-method study. The qualitative study surveyed the views of retail store management and retail training specialists regarding the conceptual experience management framework. Participants were requested to assess the applicability, validity, efficacy, and impact of the conceptual customer-centric experience management framework. This is to assist in explaining, enhancing, and corroborating initial data obtained from the quantitative study and to address the “how” (tactics) of the conceptual customer experience management framework more comprehensively.

The next section highlights the most important elements of the qualitative research design.

8.2 RESEARCH DESIGN

8.2.1 Research purpose and objectives

The study’s research problem revolved around the discrepancy between the experiences customers expect from their retail providers and the actual service they receive from retailers. This discrepancy is a leading indicator of poor customer service that leads to low customer experience ratings and is the cause of high customer switching-to-competitor incidences.

The qualitative phase of the study is for the broad purposes of breadth and depth of understanding and corroboration, focusing on the views of retail store management and training specialists. Their opinions, beliefs, attitudes, and motivations on whether the discrepancy can be bridged by implementing a pragmatic, multifaceted, customer-centric experience management framework that is entrenched in a retail store customer journey were investigated.

The primary aim of the qualitative study was to provide breadth and depth of understanding and corroboration with quantitative study findings. The secondary aim was to provide retail management insights into pragmatic retail store tactics that can be implemented to stage,

support and manage the twelve key constructs of the conceptual experience management framework (Johnson *et al.*, 2007:123).

8.2.2 Population, sampling technique and sample size

The qualitative target population consisted of retail store management from prominent South African retail entities comprising 149 branded retail stores nationwide. The store complement comprised 86 company-owned and managed stores and 63 dealership stores. These organisations were purposely selected because they have implemented the customer experience philosophy and the customer journey methodology for over two decades.

The study focussed primarily on dealership stores for the qualitative analysis due to their ease of access. Retail store management was trained in applying customer experience strategies and tactics and has extensive experience in customer journey principles and practices. The total population for the study consisted of 63 retail store management and dealership training academy staff.

A purposive selection of 17 participants was chosen from dealership senior, regional and area management, and dealer training academy staff. These participants, across all dealership retail management and training levels, were purposively chosen because of their experience in customer experience and customer journey theories and practices. A breakdown of the participant positions (job levels) is contained in Table 8-1.

Data analyses were informed by saturation plus two considerations dependent on the richness of the data obtained (Guest *et al.*, 2006:62). Saturation is reached when the researcher establishes the point where the analysis of qualitative data does not add any incremental insights and the amount of repetition provides the researcher with the confidence to make analytical generalisations (Adler & Adler, 2012:8; Baker & Edwards, 2012:31; Creswell & Poth, 2016:64).

8.2.3 Research instrument

After being updated with lessons learned from the quantitative study, a qualitative interview guide was piloted before finalisation and launch. It was piloted with two senior and experienced dealership retail store managers situated in the Gauteng province. The interviews lasted fifty minutes each, enabling the researcher to enhance the qualitative research instrument's reliability, validity, and technical soundness (Maeda *et al.*, 2023:1028; Martella & Martella, 1999:179). A limited number of questions were refined to remove repetition and confusion before the final Interview Guide (Appendix B) was used with the 17 sampled participants.

The next section describes the qualitative study data collection technique.

8.2.4 Data collection technique

The Interview Guide consisted of an introduction, the purpose of the study, study objectives, anonymity, confidentiality, general rules, a participant consent section, guidelines applicable to the interview and semi-structured questions. The researcher invited the seventeen participants to a formal two-hour meeting on 27 June 2023 to provide background to the study and explain the qualitative interview guide. Participants were encouraged to share at length their practical retail experiences on applying the 12 constructs included in the conceptual customer-centric experience management framework.

Participants requested the interview guide to be emailed to them for completion and indicated their availability for telephonic clarifications should the researcher require additional information. This arrangement was requested due to participant time and availability constraints because of the retail workload brought about by their financial year-end responsibilities. The Human Resources Manager of the study participants acted as coordinator and distributed the interview guides to all participants in a Google Document format.

Written responses of the seventeen participants were collected and summarised in a Word Excel format and provided to the researcher on 13 July 2023. The researcher scrutinised the results of the written submissions, and only five submissions required the researcher to contact the participants by telephone to obtain minor clarifications on their submissions.

The next section describes how the collected data was captured and analysed.

8.2.5 Data analysis technique

The study applied an iterative thematic analysis approach to capture the complexities of meaning within a textual data set (Guest *et al.*, 2012:10; Lockmiller, 2021:2032). The focus was not on counting explicit words or phrases but on identifying and describing implicit and explicit ideas within the data through themes. The researcher focused on textual coding, thematic development, and descriptions based on identified codes.

The analysis of the qualitative data followed a dual process. First, a data reduction and thematic analysis process was applied to detail participant responses, resulting in emerging themes for Sections A, B, C and D of the interview guide. The second part of the analysis process was an extension of the first, where an approach that resembles axial and selective coding was applied, resulting in consolidated themes for Sections B, C and D.

Analysing textual data and applying a content and thematic data analysis and an appropriate coding approach were used to reach research findings (Turner *et al.*, 2021:5). Malhotra *et al.* (2017:244) refer to coding as “the process of bringing together participants’ responses and other data sources into categories that form similar ideas, concepts, themes, or steps or stages in process”.

The coding process followed by the researcher was primarily based on guidelines provided by Bernard and Ryan (1998:607) and Malhotra *et al.* (2017:246) and commenced with the reading of participant responses to identify possible categories (proxy for themes) within responses. This was followed by comparing categories to identify the structure, resulting in final themes. These themes were then synthesised and sorted into recognisable general categories that could be mapped against the study’s conceptual customer experience management framework.

Clark and Braun (2017:1) describe thematic analysis as unusual in the canon of qualitative analytic approaches because it offers a method - a tool or technique unbounded by theoretical commitments – rather than a methodology (a theoretically informed and confined framework for research). The second part of the analysis and coding process, which is extracting consolidated themes, stems from this unconfined explanation of the thematic analysis process.

Delve and Limpaecher (2022c) explain the second part of theme coding by referring to the breaking up of textual theme data into discrete parts, drawing connections between thematic codes, and then selecting one or more central categories that connect all the thematic codes to capture the essence of the research.

Following the described process, the researcher endeavoured to define the properties of the categories created, specify conditions under which each category has developed, and note the impact of each category and the interrelationships with other categories. By fusing the categories, it was possible to identify the potential critical success factors impacting the implementation of the conceptual management framework. Doing so enabled the researcher to make a theoretical and empirical contribution to the field of study.

This chapter discusses the findings related to all questions for all four sections (Sections A, B, C & D) of the interview guide. The findings for all questions were summarised at the end of the chapter. Only limited illustrations of the detailed thematic analysis processes that were followed are included in this chapter. The rest are contained in the study’s appendices. For illustrative purposes, the thematic analyses for Section A: Question 2 (singular responses) and Section B: Question 12 (multiple responses) are shown in detail.

8.3 QUALITATIVE DATA ANALYSIS AND FINDINGS

The qualitative interview guide addressed to retail store management and retail store training specialists consisted of:

- Section A displayed participant demographics,
- Section B elicited comments on participant company retail store customer measurement and management models,
- Section C requested participant inputs on the study's conceptual retail store customer experience 12E management model, and
- Section D dealt with the impact of satisfied customer experiences on customer satisfaction, engagement, and re-patronage.

The following section focuses on Section A's findings, the participants' demographics.

8.3.1 Analysis and findings of Section A – “Participant detail”

The demographic details of the seventeen qualitative study participants are reflected in the responses to Section A of the qualitative interview guide. The section comprises the following six questions:

- Question 1: Please indicate your employer?
- Question 2: Please indicate your position?
- Question 3: How long have you worked in this position?
- Question 4: Please indicate how many stores (shops) you manage?
- Question 5: Please indicate in what regions (or metropolises) your stores are located?
- Question 6: What is your highest educational qualification?

The nature of demographic questions and participant responses to Section A are not ideally suited to comprehensively illustrate the thematic analysis processes followed as described in paragraph 8.2.5. However, data reduction and thematic analysis techniques were applied to all six questions of Section A and are reported in Appendix D.1 to Appendix D.4. This section will

only focus on the thematic analysis of Question 2, followed by a summarised overview of participant demographics themes as per responses to Question 3 to Question 6.

Findings of Question 1: “Please indicate your employer?”

Responses to Question 1 indicated that different retail companies employed participants. Per the participants’ conditions of participation in the study, the identity of individual companies will not be revealed. However, all seventeen study participant employers belong to the South African Communication Sector, operating as Communication Service Providers (CSP) through their respective networks of owned and operated retail stores.

Findings of Question 2: “Please indicate your position?”

This question dealt with participants’ positions (job titles) in their respective companies. The analysis of Question 2 responses using coding enabled the identification of categories and key themes within the textual data, as described below.

A coding process was used by taking the textual responses from Question 2, and through colour coding, discreet job titles of participants were identified. The colour coding initiated the data reduction by identifying the different job title categories. (See Table 8-1).

Table 8-1: Category identification for Question 2: “Please indicate your position?”

Participant	<u>Question 2: Please indicate your position?</u>	Participant	<u>Question 2: Please indicate your position?</u>
1	Area Manager	10	Soft Skills Learning and development
2	Senior Manager	11	Regional Manager
3	Area Manager	12	Flagship Manager
4	OPS Specialist	13	Area Manager
5	Facilitator	14	Regional Manager
6	Area Manager	15	Junior Facilitator
7	Area Manager	16	Junior Facilitator
8	Area Manager	17	Flagship Branch Manager
9	Flagship Branch Manager		

In applying data reduction, the colour coding in Table 8-1 revealed eight different participant job titles. These eight titles were reduced into seven job titles, as Table 8-2 illustrates. It was then

further reduced into four positional themes. Table 8-2 illustrates the process of category and theme identification.

Table 8-2: Categories and themes for Question 2: “Please indicate your position?”

Categories	Themes
Area manager – 6	Senior management - 3
Regional manager – 2	Middle management - 6
Senior manager – 1	Junior management - 4
OPS specialist – 1	Training specialist - 4
Flagship branch manager - 3	
Facilitator – 3	
Soft skills learning and development - 1	

The four positional title themes, senior management, middle management, junior management, and training specialists indicated that the qualitative study surveyed all levels of retail management. It comprised responses from management participants from a retail head office perspective and regional, area and store management levels. It also included training specialists responsible for retail staff training.

Findings of Question 3 to Question 6 summarised

The data reduction and theme analysis methodology applied to Question 2 were also followed with the remainder of Section A questions. The full thematic analysis of Questions 3 to 6 is reflected in the study's Appendix Sections D.1 to D.4. The Themes that emerged from these analyses are summarised in Table 8-3 and provide a comprehensive overview of the participants' demographic profiles.

Table 8-3: Summary of demographic profile themes for Question 3 to Question 6

Question 3: How long have you worked in this position? (n)	Question 4: Please indicate how many stores you manage. (n)	Question 5: Please indicate in what regions (or metropolises) your stores are located. (n)	Question 6: What is your highest educational qualification? (n)
1- 3 years (10)	0 shops (4)	Head Office (1)	No reply (1)
4- 6 years (2)	1 shop (4)	All regions (2)	Matric (2)
7 - 10 years (5)	5 shops (9)	Gauteng (13)	Post matric (14)
		Northwest (2)	
		Mpumalanga (2)	

Findings of Question 3: “How long have you worked in this position?”

Information revealed at the study’s introductory meeting with all seventeen participants indicated that participants with tenures of less than three years were newly appointed. All these participants, however, had at least ten years of retail operational and management experience before being appointed to their current positions at their current companies.

Three main themes emerged from the analysis of responses (Appendix D.1): Ten participants indicated between 1-to-3 years in their current positions, two participants fall within the 4 to 6-year category, and five indicated they are between 7 and 10 years in their current positions.

A literature review was conducted to establish if extant literature supports the importance of tenure in retail.

Extant literature places a high premium on tenure terms as a proxy for experience. Abdolvand and Farzaneh (2013:2668) indicated that experienced retailers possess valuable retail experience, interpersonal and problem-solving skills. Schmitz *et al.* (2020:84) also stress the importance of highly experienced sales managers as they understand customer expectations, find ways to explore customers and increase sales. This is supported by Chiliya and Roberts-Lombard (cited by Toohey, 2009) and argue “that the breadth of experience is shown to be an important factor driving the performance of firms”. Chiliya and Roberts-Lombard (2012:462), in referring to research by Lumpkin and Marvel, also state that “the number of previous jobs positively related to new firm performance”.

Research by Thomas *et al.* (1998:500) shows that management experience is related to retail store efficiency. Their findings indicate that management tenure at highly efficient stores averaged seven years, while tenure at low-efficiency stores was only just over five years.

Sharma and Choudhary (2010:110) confirmed the connection between experience and efficiency, though not as significant as Thomas *et al.* The connection is also supported by Ko *et al.* (2017:7) and Uyar *et al.* (2013:339), indicating that store age, as a proxy for management experience, does play a role in-store performance.

Research conducted by Kaila (2021:192) indicates that frontline employees in retail give significant importance and credit to their experience in customer service and learning at the store level and through their colleagues. The previous and current retail tenures of sampled study participants attest to their retail experience, the impact it has on retail stores and, thus, their suitability for inclusion in this qualitative study.

Findings of Question 4: “Please indicate how many stores you manage?”.

Appendix D.2 contains the analysis of Question 4 responses. Nine of the fifteen participants managed five stores, while four managed one each. Four participants indicated that they do not manage any retail stores. These participants included a Senior Manager based at the Brand company head office responsible for overseeing the company’s customer experience management division. It also included two participants primarily responsible for training retail store staff and one participant responsible for retail operations.

Findings of Question 5: “Please indicate in what regions (or metropolises) your stores are located?”.

Data reduction and theme analysis per Appendix D.3 show that fourteen participants were situated primarily in the Gauteng Province, South Africa’s most important economic hub (Stats SA, census 2022). Two participants managed stores in all regions where their respective companies have a regional footprint. Two participants managed Northwest Province stores, and two managed stores in the Mpumalanga Province.

Findings of Question 6: “What is your highest educational qualification?”

The analysis of Question 6, as reflected in Appendix D.4 resulted in the identification of seven categories of qualifications: Diploma, Certificate, Master’s degree, Honours degree, Bachelor’s degree, Post Matric and Matric. These seven categories were reduced to two emerging themes, namely post-matric (14 participants) and matric (2 participants). One participant chooses not to provide detail on educational qualifications.

The importance of educational qualifications in extant literature:

Educational qualifications can be regarded as an important business requirement. Studies conducted by Fairlie and Robb (2009) and Wanigasekara and Surangi (cited by Chiliya & Roberts-Lombard, 2012:462) found a strong relationship between business experience, education, and business success. The significance of the relationship between the level of education and business success is acknowledged by Arnhold (2021) and Chiliya and Roberts-Lombard (2012:466), who states that “education has an impact on the overall business performance as measured by net profit”.

Participant responses to Section A provided an overview of the demographics of study participants, confirming their suitability for qualitative study purposes. The next section contains the findings of Section B of the interview guide that deals with participants’ retail store use of customer measurement and management models.

8.3.2 Findings of Section B - Current retail store customer measurement and management models (Questions 7 to 12)

Section B of the interview guide consisted of six questions. Participants shared their views on their retail companies’ application of formal Customer Experience Management (CEM) processes (Question 7), the elements associated with the processes (Question 8), the level of their company’s most recent official customer experience scores (Question 9) and the level of customer experience in the SA retail industry (Question 10). The interview guide also elicited responses regarding a possible mismatch between retail customer expectations and the level of service experienced at retail stores (Question 11) and the reasons for such a mismatch if it exists (Question 12). Data reduction and theme consolidation were performed on all six questions and are contained in the study’s Appendices section.

This section provides the findings of each of the six questions as derived from the thematic analyses.

8.3.2.1 Findings of Question 7: “Does your company have a formal customer experience management (CEM) process, or any other customer measurement and management process in place? If so, please identify and explain the process?”.

Data reduction and theme identification for Question 7 are reflected in Appendix D.5.1. Table 8-4 presents the findings, followed by participant responses and extant literature validation. The question comprises two sections: first, if a CEM process exists, and second, to identify and explain the process.

Table 8-4: Themes for Question 7

First section of Question 7	Second section of Question 7
Themes	Themes
Confirmers (15)	Experience processes (10)
Non-confirmers (2)	Pledge processes (3)

Confirmers indicating that their companies use CEM processes emerged as the central theme for the first section of Question 7. Two themes emerged from the secondary responses identifying respondents in-use CEM processes. These two themes, experience (10 participants), and pledge processes (3 participants), are discussed in a contributory context to the central theme.

Confirmers

Fifteen of the seventeen participants confirmed that their retail companies deployed CEM processes. This confirmed the trend that CEM has been (Pine & Gilmore, 1998:98; Swaim, 2010:33) and still is being regarded (Thomas *et al.*, 2023) as a strategic management tool (Bustamante & Rubio, 2017:885) that can deliver a competitive advantage to companies. For this reason, companies continually seek to establish a framework that allows studying and establishing methods of evaluating customer experience, particularly in retail (Bascur & Rusu, 2020:9).

Contributory themes

From the fifteen confirmers, eight participants indicated the application of Net Promoter Score (NPS) in their customer experience management processes. Customer pledging was mentioned by three participants as a mechanism used by participant companies to promote higher levels of customer experience. Four participants confirmed using CEM processes but did not specify the processes.

CEM methods deployed by participant companies are summarised in two main themes that emerged from sub-categories to the confirmatory theme. These are experience processes and customer pledge processes.

The following customer responses were recorded per the emerged theme:

Experience processes

- Participant 2: “Yes, full Voice of the Management (VOM) capability with closed loop”.

- Participant 4: “Yes, NPS (Net promoter score) customer service satisfaction survey established from questions related to customer service experience”.
- Participant 17: “NPS - Customer receives an SMS to rate service received from a store after agent interaction”.

Pledge processes

- Participant 3:” Customer Service Pledge where agents are taking an oath of serving customers with excellence”.
- Participant 8:” We’ve just introduced the Customer Service pledge where everyone in the business is supposed to manage the process and execute”.

The existence of Question 7 themes in extant literature:

A literature review was conducted to confirm whether the themes that emerged from Question 7 are borne out by extant literature. The search confirmed that the themes that emerged in Question 7 are consistent with those in the literature.

A wide variety of CEM processes are being used or considered by companies. These include processes such as Customer Satisfaction (Lemon & Verhoef, 2016:72), Voice of the Customer (De Keyser, 2015:175), various neuroscientific techniques (De Keyser, 2015:186), NPS (Zolkiewski *et al.*, 2017:10) and the application of immersive technologies (Dieck & Han, 2022:108). Companies continuously assess customer opinions, perceptions, and experiences to advance the understanding of “customer experience and provide the basis for its measurement” (Lemon & Verhoef 2016:72).

Research indicated that customer experience measurements are no longer an option but a critical necessity. Lemon and Verhoef (2016:72) refer to NPS as a standard practice experience measurement within marketing, while Häring (2017:8) states that “the default industry standard for customer loyalty has been the Net Promoter Score (NPS)”. This is supported by Zolkiewski *et al.* (2017:10), who note that NPS is a prevalent customer feedback metric and is extensively used by businesses as a customer experience metric via a ‘word of mouth’ proxy measure. This trend demonstrates a move from product-centric metrics towards more outcomes-based strategic service-centric metrics “to alleviate congestion, support economic growth and enhance and support the communities it serves” (Zolkiewski *et al.*, 2017:13).

Rajasekaran and Dinesh (2018:980) indicate that “NPS helps companies to focus on how customers create value for the company and not how an organisation can create value for the

customer. As a competitive benchmark, NPS shows where the company is standing in the market. NPS is more applicable in the market with more competitors as it could be compared with”.

Some participant companies also indicated the application of customer pledge strategies and tactics. However, Cheung (2005:361) is critical towards the use of customer pledges and explains that if the common customer is to rely on these performance pledges to have any sense of what treatment they can expect to receive or how they can be empowered, then what an average pamphlet contains falls short of the expectations or the rhetoric of a new customer culture. Suppose these pledges are considered to be a kind of contract with customers. In that case, the contract has been drawn up only in favour of what services providers want to be included for management purposes rather than to incorporate what service users should legitimately expect from customer rights.

8.3.2.2 Findings of Question 8: “Please indicate the different elements of your CEM process, or the customer measurement and management process in use?”

Question 8 explored the different elements of participants’ CEM processes.

Participants mentioned the use of a variety of experience performance indicators. These indicators include customer effort and quality of service measurements. Detail assessments on helpfulness, knowledge, availability of stock and turnaround time were mentioned as critical indicators used in their customer experience assessment.

An analysis of Question 8’s responses, as indicated in Appendix D.5.2, resulted in five categories: customer journey KPI’s, NPS customer rating, queue management, agent/customer interaction KPI’s and a no-response category. Further analysis of these categories resulted in one overriding theme for Question 8: customer journey KPI’s (13 participants).

Journey KPI’s

The following responses were offered by participants:

- Participant 2: “Customer surveys based on customer journeys (Acquisition, Service & Use), key KPIs measured include Customer Effort Score (CES) and Quality of Service (QoS). Sentiment analysis used for root cause analysis and identification of improvement areas.”

- Participant 11: “Kept informed, Agent helpfulness, Agent knowledge, Agent professionalism, Availability of stock, Service as expected, Service as needed, Turnaround time, Variety.”
- Participant 13: “The NPS customer rating I mentioned in the previous question does not go into detail.”

The existence of the Question 8 theme in extant literature:

Shop efficiency remains a key factor requiring “evaluation, promotion and development of shop personnel which rely on factors impacting shop financial performance; strategic resource-allocation decisions which are based on what drives shop performance; monitoring of shop management procedures and their influence on shop performance” (Uyar *et al.*, 2013:331).

The *Customer journey* theme that emerged from Question 8 resorts under the “other approaches” category identified by Lemon and Verhoef (2016:72). Responses confirmed the importance participant companies attach to “understanding and orientation of business resources to the customer journey and related touchpoints” (Dieck & Han, 2022:113).

8.3.2.3 Finding of Question 9a and Question 9bd

Questions 9a and 9b dealt with participants' assessments of the level of customer experience in their respective companies.

Findings of Question 9a: “Please indicate and describe the level of the most recent official customer experience or customer measurement score for your company’s retail stores?”.

Eleven out of seventeen participants indicated their company’s most recent customer experience performance as good (Appendix D.5.3). Only five participants regarded their performance as poor, with one participant not responding.

Finding of Question 9b: “Please explain the reason for the rating?”.

Participants indicated that retail management motivation, sales staff performance, ease of shop, staff training, and product quality were all factors that played an important role in awarding their companies with good to very good customer experience ratings. The five participants indicating that their companies performed poorly cited poor management information, poor service from staff, insufficient store atmospherics and inadequate logistical and marketing support to stores and retail staff as reasons for poor assessments.

Two main themes were identified for Question 9b, as shown in Appendix D.5.4. The following participant responses were recorded under each of the themes:

Good rating - staff and products (10 participants)

- Participant 6: “Very Good -Customer wrote a compliment for the service rendered by one of our Sales agents, and she said that this was the best service she ever received.”
- Participant 10: “Very Good -The customer was satisfied with their product (feedback from a store).”
- Participant 11:” Good - In most cases, customers rated the service as easy or extremely easy.”

Poor rating - staff and logistics (8 participants)

- Participant 5: “Poor - No assistance from the floor staff.”
- Participant 13: “Overall, the brand has a bad customer experience from the look and feel of the logo, stores, catalogue and agent etiquette.”
- Participant 14: “Poor - 82%, which is not good; we need to be on 95% to 100% - Reason, network problems - long waiting times - stock issues - agent knowledge.”

The existence of Question 9b themes in extant literature:

Extant literature also stressed the important roles that staff, products and store logistics play in customer experience. Roozen and Katidis (2009:257) accentuate that retail staff can “personally provide a pleasant shopping experience” by spending sufficient time with customers and assisting them through their purchase decision processes. The researchers also refer to the importance of products on offer, interactions with staff and the “overall pleasant and joyful shopping atmosphere in creating positive shopping experiences (Roozen & Katidis 2019:266).

Faria *et al.* (2022:184) believe that store design is an “essential variable” to ensure satisfied and committed customers and to be more competitive. Other variables that should be evaluated are reliability, responsiveness, and the ability of retail staff to provide attentive service and reliable information at the point of sale (Faria *et al.*, 2022:194).

LiveAgent (2023) reports that a single negative interaction with a service employee displaying inappropriate behaviour, bad manners, and an unfriendly attitude leads to poor customer

experience and churn. It is posited that not resolving customer issues, ignoring service requests, long waiting times, poor retail staff knowledge and a lack of manners and etiquette should be prevented as it impact customer experience (LiveAgent,2023).

8.3.2.4 Findings of Question 10a and Question 10b

Questions 10a and 10b dealt with participants' assessments of the level of customer experience in the SA retail industry.

Question 10a: “Based on your experience, how would you describe the level of customer experience in the SA retail industry?”

Two themes emerged from the analysis of Question 10a in Appendix D.5.5: good and poor experience. These findings correlate with the previous question's theme discussion, though with contrasting results. Twelve participants indicated that the SA retail industry performed poorly on customer experience. Only five participants indicated that the SA retail industry performed well on customer experience ratings.

Findings of Question 10b: “Please explain the reason for your rating?”

Participants emphasised that poor customer ratings can be attributed to poor staff training, motivation, attitude, and lack of staff accountability. Consistency in service, product quality, product availability, poor implementation, and acquainting retail service to the quality of service from governmental institutions were some reasons for poor service in the South African retail industry.

From the analysis of participant responses to Question 10b in Appendix D.5.6 two main themes emerged, consistency in service (eleven participants) and staff training (ten participants). Participant responses emphasizing the level of customer experience ratings in the SA retail industry include the following:

Consistency

- Participant 1: “Not all companies are consistent with customer service experience. It would be great if everybody took Customer Service seriously.”
- Participant 13: “The SA retail customer service is careless they do the bare minimal to acknowledge and serve the customer. There is no real kind engagement and when there is mostly because it's initiated by the customer when this should be the opposite. Every here is on defence mode.”

- Participant 17: “There is lack of consistency in the quality of service rendered. It somewhat subjective to appearance, race, and gender.”

Staff

- Participant 5: “Not all employees are putting in an effort to provide the best customer service. it’s all about the salary more than getting the job done.”
- Participant 10: “8 out of 10 times I’m dissatisfied with the experience due to either service or product quality.”
- Participant 11: “Don’t care attitude, no after sales service or follow up, front end staff with are not focused on the customer they are serving but rather chatting to other workers, lack of knowledge, slow service.”

The existence of Question 10b themes in extant literature:

Participant responses are supported by several South African research studies over an extended period. These studies, as referred to in detail in Chapter 1, include Capital Connect Research 2023, The Ask Afrika Orange Index 2021, The South African Consumer Goods and Services Ombudsman’s (CGSO) Annual Report 2020/21 and the CGSO Annual Report 2016/17.

Recent research on South African retail data analysis from January 2015 to June 2023 shows that SA retailers lose billions in sales due to customer disconnect (Naile, 2023). These trends support the opinions of several researchers that assert the blame on companies that use customer-centric words but display non-customer-centric actions (Klimek *et al.*, 2017:2; Meyer & Schwager, 2007:119; Scott, 2016:18). Batat (2019:144) refers to a resultant discontinuity between consumption experiences, the insights amassed from it as well as the way it affects the “lived experience”.

The “disconnect”, as described by Naile (2023), and the “discontinuity” described by Batat (2019:144) were explored further within a South African retail context through an analysis of responses to Question 11 and Question 12.

8.3.2.5 Findings of Question 11: “Do you believe a mismatch exists in the retail industry between customer expectations and the level of service being experienced at retail stores?”

Participant responses to Question 11 deal with a perceived mismatch between customer expectations and the level of service experienced at retail stores. This question is of specific importance to the South African retail industry as academic literature extensively refers to such a perceived mismatch in the international retail domain (Chapters 1 & 3).

Theme analysis of Question 11 (Appendix D.5.7) resulted in three themes: confirmers, non-confirmers, and indecisives. Responses to Question 11 indicated that the perception of a mismatch is also evident among study participants. Thirteen of the seventeen participants confirmed a mismatch, two were unsure, and two indicated that they do not believe a mismatch exists.

The existence of Question 11 themes in extant literature:

Research into customer behaviour consistently over decades has shown that customers expect memorable experiences for them to be retained as customers (Drucker, 1954:34; Pine & Gilmore, 1998:98; Swaim, 2010:33). Seamless shopping experiences are non-negotiable imperatives for good customer experience ratings (Gummesson, 1995:250; Pappas *et al.*, 2023:525). These basic expectations from customers were also recorded by Baker *et al.* (1992:448) and echoed by Hahn *et al.* (2012:1). However, notwithstanding all the progress made in customer service, satisfaction, experience, retention, and customer loyalty (Sparks, 1992:165), Thomas *et al.* (2023) still maintain that the retail industry and its physical retail channels are in dire need to investigate and improve customer experience ratings.

In reviewing customer experience studies across three continents (USA, UK, South Africa), a worldwide phenomenon of declines in customer experience levels was indicated over an extended period. As reported in Chapter 1, Forrester’s Customer Experience Index 2022 revealed widespread drops in American customer experience quality and major failures in brands’ customer focus. A study by KPMG in 2021 showed renewed declines in customer experience ratings in the UK. The Ask Afrika Orange Index 2021 stated, “customer experience levels decline in the past five years. The decline in customer experience is on both the emotional and service-related components of the experience. A comment by Tomas *et al.* (2023) in the Harvard Business Review fittingly summarised these trends by stating that “despite all the effort and money poured into CX tools by companies, customer satisfaction continues to decline”.

Studies by Batat (2019:144), Goldstein *et al.* (2002:124), and Meyer and Schwager (2007:119) suggest that the problem of declining customer experience levels lies in the existence of a discrepancy, a disconnect, a substantive gap that exists between customers' expected customer experience and the experience provided by a service provider.

The next section deliberates on the reasons attributed to the discrepancy between expected customer experience and actual customer experience, as it emerged from the analysis of Question 12.

8.3.2.6 Findings of Question 12: "If a mismatch exists, to what do you ascribe the mismatch? Please explain".

Question 12 is a follow-up on Question 11, where participants were asked to confirm whether they believe a mismatch exists between expected customer experience and actual customer experience in the retail industry. Though the analysis of Question 12 responses is shown in Appendix D.5.8, the detail is repeated in this section for illustrative purposes of the following thematic analyses.

Table 8-5 comprises participant responses to Question 12. Data reduction on participant responses, the identification of categories and themes as well as the reduction of themes into a consolidated theme are illustrated in Table 8-5:

Table 8-5: Data reduction and theme identification for Question 12

Participant	Responses to Question 12	Categories
1	Staff do not understand that in order to increase revenue they have to delight customers; in some industries customers don't have a choice like food and medicine – they have to buy to survive	Business acumen
2	Some other retailers are taking customer service to the highest level	Management
3	Customers go to a store and assume that the agents are able to assist with anything they might need done, forgetting that there are escalation paths and turnaround times allocated to these processes and this is enough to discourage a customer and make them irate because they might have to return to the store or wait longer for resolution, so it is very important for agents to be confident and clear in explaining the process and the reason for the possible delay to try and avoid these situations from leaving a bad customer service experience.	Staff able to assist Staff confidence Customer education

Participant	Responses to Question 12	Categories
4	No response offered	
5	Most retail staff don't exercise exceeding expectation.	Staff training Appraisal
6	Failure by staff to take ownership of their customers, they don't see customers as people who bring in their revenues	Staff ownership Business acumen
7	In many instances customer expectations are not meet due to lack of customer service as well as lack of product knowledge from the agents	Customer service Product knowledge
8	Retail staff seem to be OK in giving customers the bare minimum and customer are getting used to expecting and accepting it.	Staff motivation Appraisals
9	Amongst other socio-economic and geographical factors, global economic crisis's & Inflation could indirectly be influencing sales- not only down the supply chain of production but also on a psychological level. I believe this sub-consciously influences the level of enthusiasm/ motivation behind interactions, selling and connecting with the customer on a personal level (financial pressure to achieve targets faster= low morale). This was especially evident to be during and after the Covid-19 lockdown period.	Staff motivation
10	Lack of loyalty toward companies by retail staff at the coal face. Retail workers are undervalued by their employees, remuneration is extremely low and there is no trust between the worker/employee and vice versa, thus it is difficult to motivate the correct behaviour	Staff loyalty Staff undervalued Trust
11	Staff must know that they are there to help customers	Objectives
12	The gap exists because the management's perception of customer expectations is different from actual customer expectations.	Management
13	I think over all customers' expectations are too high and customers are not well informed.	Customer education
14	As a customer you expect to be treated with respect and as first priority in any retail environment. receive assistance where applicable and leave the store with references in place already because you were happy about the service delivery. These days, Retail employees feels as if customers owe them the world and they are disrespectful.	Staff respect

Participant	Responses to Question 12	Categories
15	No response offered	
16	Chasing profits	Management
17	No response offered	
Categories		Themes
Business acumen		Training (10) Goalsetting (3) Management (3) Business acumen (3) Trust (3)
Management		
Staff assistance		
Customer education		
Staff confidence		
Staff training		
Appraisal		
Staff ownership		
Business acumen		
Customer service		
Product knowledge		
Staff motivation		
Appraisals		
Staff motivation		
Staff loyalty		
Staff undervalued		
Trust		
Objectives		
Management		
Customer education		
Staff respect		
Management		

Data reduction of Question 12 resulted in the identification of twenty-three categories. Through coding, five main themes emerged as being at the root of the perceived mismatch, as confirmed by most sampled retail participants (Question 11).

Participant responses attributed the existence of a mismatch between customer expectations (a proxy for customer projection) and customer experience (a proxy for reality) to five themes. The themes include training, goalsetting, management, business acumen and trust.

The following participant responses per the emerged theme were recorded:

Training

- Participant 3: “Customers go to a store and assume that the agents can assist with anything they might need done, forgetting that there are escalation paths and turnaround times allocated to these processes and this is enough to discourage a customer and make them irate because they might have to return to the store or wait longer for resolution, so it is very important for agents to be confident and clear in explaining the process and the reason for the possible delay to try and avoid these situations from leaving a bad customer service experience”.
- Participant 7: “In many instances, customer expectations are not met due to lack of customer service as well as lack of product knowledge from the agents”.
- Participant 14: “As a customer, you expect to be treated with respect and as first priority in any retail environment, receive assistance where applicable and leave the store with references in place already because you were happy about the service delivery. These days, retail employees feel as if customers owe them the world and they are disrespectful”.

The existence of the theme in extant literature:

Employees are the most valuable asset in any organisation (Brito, 2018), and professional development and training opportunities are the best ways to inspire and support individuals in an organisation (Kodithuwakku *et al.*, 2018:278). This general statement is supported by Abhari *et al.* (2012:2), who relate the importance of employees to customer experience management and posit that employees “is critical to the success of CEM as employees are the most valuable asset in any organisation”. The success of customer experience management depends heavily on how employees are engaged and supported in customer experience design (Abhari *et al.*, 2012:2).

Research published by Netomi, an American artificial intelligence company and developer of human-computer interaction technologies, on the state of customer service in 2022 reports on the reality of customer support, indicates the shocking reality of today’s customer service landscape and showcases the fact that businesses need to adapt their processes and invest in additional agent training to ensure customer satisfaction” (Netomi, 2022). Liao *et al.* (2012:73), Pappas *et al.* (2023:523) and Theodoridis and Chatzipanagiotou (2009:709) confirmed that retail

store environmental factors such as staff knowledge and staff attitude have a significant impact on customer perceptions, behaviour, and experience.

The importance of staff knowledge and attitude compels Pappas *et al.* (2023:524) and Wilder *et al.* (2014:8) to call for the training of sales staff to identify and empathise with customer needs and wants (emotional, physical, financial), enabling creativity in adaptive retail offerings exceeding customer expectations. Otnes *et al.* (2012:369) emphasise training retail staff on customer experiential exchange communication tactics, while Puccinelli *et al.* (2009:25) refer to the need for training to influence customer sensory experiences. Pugh (2001:1019), supported by Pappas *et al.* (2023:524), suggests that retail staff should be empowered (skilled) to engage in adaptive behaviour by using discernment on what behavioural styles are appropriate for what type of customer interactions. Abhari *et al.* (2021:3) accentuate the need for “solutions to encourage, engage, train and support employees in job crafting”.

Empowering retail sales staff through training interventions, coaching, and roleplay to recognise and read customer’s nonverbal cues can assist staff to respond more effectively to customer needs and wants expectations (Pappas *et al.*, 2023:529; Puccinelli *et al.*, 2009:24). This empowerment of retail staff can be extended to the proficient use of marketplace ritual language to facilitate the desired customer experience during the exchange process (Otnes *et al.*, 2012:367). Training staff in edifying rituals can even be applied to educate retail customers on negative or risky aspects of marketplace experiences (Otnes *et al.*, 2012:375).

The benefits of increased service customisation by delivering adaptive sales offerings can be achieved through sufficient retail resources and staff support. However, Sharma *et al.* (2020:240) and Wilder *et al.* (2014:446) maintain that staff adaptiveness and appropriate skills are critical requirements for providing adaptive sales offerings to retail customers. This does not come automatically but only through training and coaching of retail staff.

The following participant responses per the emerged theme were recorded:

Goalsetting

- Participant 5: “Most retail staff don’t exercise exceeding expectation “.
- Participant 8: “Retail staff seem to be OK in giving customers the bare minimum, and customers are getting used to expecting and accepting it”.
- Participant 11: “Staff must know they are there to help customers”.

The existence of the theme in extant literature:

The role of retail staff, their behaviours, goals, achievements, and contributions towards retail company objectives are best served through effective and efficient human resource management practices. In this regard, Kodithuwakku *et al.* (2018:269) refer to “the effect of HRM practices on business performance such as training and development, compensation, teamwork, HR planning, regular performance appraisal and employee security leads to increase in firms’ business performance and employee’s productivity, product quality and the firm’s flexibility”.

Guided by the human resource management practices “employees can contribute to customer experience co-creation more effectively if they find their role meaningful by realizing the immediate impact of their work, and if they are included in decision-making, service innovation, and acknowledged for their contribution” (Abhari *et al.*, 2021:3). Defining and developing metrics and governance systems for continuous improvement within retail stores can be achieved through reinforcing front-line staff cultures and optimise operational processes and systems (Jones & Vancauwenberghe, 2014:3).

In conceptualising what retailers offer their customers, they should constantly update “the customer experience measurements” and align organisational and retail staff performance contracts accordingly (Maklan & Klaus, 2011:771). However, customer experience is linked inextricably to what Abhari *et al.* (2021:2) define as employee experience, which is the perception of experiential values offered by a work environment. Abhari *et al.* (2012:2) state that these experiential employee values are created mainly when an employee attains meaningful goals, contributes to innovation, and interacts with customers.

The experiential values are regarded by Abhari *et al.* (2012:2) as proxies for competence, autonomy, and relatedness, the three basic psychological needs of all employees identified by Deci *et al.* (2017:19). The satisfaction of these employees needs to promote autonomous motivation, high-quality performance, and wellness among employees (Deci *et al.* 2017:38). In tandem with these experiential values or basic psychological needs is the acknowledgement that the functional significance of managerial tools such as compensation, deadlines, monitoring, goal setting, and work design is essential within today’s effective organisations” (Deci *et al.* 2017:39).

The primary objective in retail for organisations and staff is to understand the customer (Cain, 1998:11; Gulati & Oldroyd, 2005:97; Pappas *et al.*, 2023:528); hence, the challenge by Becker and Jaakkola (2020:631) to obtain more certainty on what goals are being aspired to with the customer experience phenomena. Goals should clarify how to create, manage, measure, and

maintain a distinct customer experience resulting in an emotional engagement that leads to customer re-patronage (Pappas *et al.*, 2023:525; Prokesch, 1995:101).

The quest for an emotional engagement with customers should indicate the key drivers to influence customers at different stages of the customer journey (Lemon & Verhoef, 2016:85) and guide the design and staging of cues that can be measured analysed, managed, and refined as suggested by Zomerdijk and Voss (2011:65). All this should culminate in direction giving goalsetting for staff, aid performance appraisals for organisation and staff and should also assist with the operationalisation of the customer experience journey concept in retail stores (Becker & Jaakkola, 2020:630; Chaney *et al.*, 2018:408)

Management

- Participant 2: “Some other retailers are taking customer service to the highest level”.
- Participant 12: “The gap exists because the management's perception of customer expectations is different from actual customer expectations”.
- Participant 16: “Chasing profits”.

The existence of the theme in extant literature:

Companies focusing on customer experience realize the value of building customer experience through a coordinated approach of strategy, technology integration, brand management and CEO commitment (Fatma, 2014:36). The conceptualisation of customer experience within this coordinated approach is one of retail management's greatest challenges (Lemon & Verhoef, 2016:85).

The gap between customer expectations and customer experiences is attributed to retail companies' inability to fully comprehend the ever-changing experiential needs and target markets' ever-changing experiential needs, requirements, and expectations (Meyer & Schwager, 2007:119; Pappas *et al.*, 2023:522). A comprehensive understanding of the target market is required before any effort can be made to plan, design, organise or deliver a service concept that focuses on customer acquisition, engagement, experience, retention, loyalty, or growth (Kotler 2020:11; Kotler, 1988:173).

For retail management to provide the appropriate direction and support to staff, they must lead by example and act as an enabler for memorable customer experiences. This comprises the planning and organising of multiple, multifaced business elements” within their retail stores to support staff in their quest for memorable customer experiences (Press & Cooper, 2016:69).

Retail management holistically must consider operating systems, touch point processes, service staff, products, services, levels of interactions and interfaces, the application of customer cues and the utilisation of environmental atmospheric space to provide a framework within which the customer journey through the store takes place (Bodine & Hagen: 2013:16).

Retail management's focus should not only be to chase profits. The thorough understanding of customers' needs and wants and their everyday use of products and services (Cain, 1998:11; Terblanche, 2018:50) should go together with the promotion of both staff wellness and high-quality performance (profits) "through transformational leadership, job characteristics, justice, and compensation approaches" (Deci *et al.*, 2017:19).

Otnes *et al.* (2012:368) believe that customer experience practitioners, including retail management, tend to be oblivious to the range of interactions customers experience, the key retail elements associated with these interactions, and how they differ across interaction experiences. This explains in part why retail stores experience difficulty in evoking mutually beneficial emotional connections between retailer and customer (Terblanche, 2018:56; Zomerdijk & Voss, 2011:65). It is retail management's responsibility to apply appropriate tools and techniques to create and instil a clear understanding of customer requirements and expectations among retail staff (Johnston & Kong, 2011:6).

Retail management should acknowledge and act upon a shift in focus "from the company's service processes involving the customer, to the customer's multi-contextual value formation, involving the company" (Heinonen *et al.*, 2010:104). In this regard, Norton and Pine II (2013:12) argue for the "rigorously developing" of knowledge and a deep understanding (deciphering unspoken cues and uncovering the emotions) behind customers' needs and expectations (Larkins, 2019).

Business acumen

- Participant 1: "Staff do not understand that to increase revenue, they have to delight customers; in some industries, customers don't have a choice like food and medicine – they have to buy to survive".
- Participant 6: "Failure by staff to take ownership of their customers, they don't see customers as people who bring in their revenues".

The existence of the theme in extant literature:

Customer engagements and -interactions with service provider company staff imply the existence of a complex set of relationships that must be developed, shaped, and promoted for parties to extract value from it (Bodine & Hagen, 2013:8). These engagements and interactions typically take place during customers' journeys at service provider touchpoints, and are enabled, orchestrated, and guided by retail staff aided by company internal business policies, processes, and the application of technology (Bodine & Hagen, 2013:8).

Retail staff should understand that customer expectations, quality and price affect customer satisfaction and customer satisfaction, in turn, affects profitability (Anderson *et al.*, 1994:53). Staff should also comprehend that these elements impact customers' "repurchase behaviour" (Fatma, 2014:42) as is also confirmed by Anderson *et al.* (1994:55) stating that "the more loyal customers become, the longer they are likely to continue to purchase from the same supplier". Fatma (2014:36) suggests that "loyalty is now driven primarily by an organisation's interaction with its customers and how well it delivers on their wants and needs". These findings are supported by Abhari *et al.* (2021:1), who extend the impact of customer experience management and state that it has a positive influence "on business outcomes such as customer attitude, satisfaction, retention, and fervent advocacy.

Staff interactions resulting in phases of engagement are regarded by Hochschild (1983:147) as "emotional labour" requiring face-to-face contact with the customer, influencing the emotional state of a customer and empowering retail staff to exercise a degree of control over the emotional attitude of customers. (Hochschild, 1983:147; Veldstra, 2020:1). In this regard, service quality by staff can result in "favourable purchasing intentions, willingness to pay more and recommendation" (Maklan & Klaus, 2011:774).

The absence of an authentic "service concept" (Goldstein *et al.*, 2002:124), with associated benefits to retail staff and retail organisations, can result in a mutual detrimental "Expectation Gap" (PWC, 2018) between retailers and customers. Retail staff must be educated that personal interaction, ergonomically pleasing environments, and service quality problem-solving are all elements influential in affecting experiences and customer loyalty to both store, store staff and brand (Yang & Lee, 2022:12; Yuen & Chan, 2010:235)

Trust

- Participant 10: "Lack of loyalty toward companies by retail staff at the coal face. Retail workers are undervalued by their employees, remuneration is extremely low, and there is no trust between the worker/employee and vice versa. Thus it is difficult to motivate the correct behaviour".

The existence of the theme in extant literature:

Morgan and Hunt (1994:23) suggest “that confidence on the part of the trusting party results from the firm belief that the trustworthy party is reliable and has high integrity, which is associated with such qualities as consistent, competent, honest, fair, responsible, helpful, and benevolent”. Wilson (1995:337) suggests that ‘trust is a fundamental relationship model building block and as such is included in most relationship models’. Due consideration should thus be given to the relationships among company management and employees as it determines the quality of all interactions (Bodine & Hagen, 2013:8).

Research by Hrebiniak (1974:659) confirmed the interdependency between trust and commitment and found that “the existence of regression of trust, commitment and the desired influence of the individual and team leader proved positive”. Pappas *et al.* (2023:529) believe that “trust remains the cornerstone of any sales interaction”. Brown *et al.* (2019:164) posit that “trust allows commitment to grow: Retail staff being the trusting party and retail management being the trustworthy party, and vice versa, suggests that “trust is an important construct in relational exchange because relationships characterised by the trust are so highly valued that parties will desire to commit themselves to such relationships” (Wong & Sohal, 2002:37).

With trust and commitment at the core of any relationship (Brown *et al.*, 2019:155), Wong and Sohal (2002:46) suggest that managers be “advised to emphasise activities and initiatives that promote feelings of affiliation” as “salesperson trust is significantly and positively related to salesperson commitment” (Wong & Sohal, 2002:43). Loughlin *et al.* (2004:532) think that relational experiences incorporate an interpersonal dimension beyond “superficial interactions” and that it has the power to influence service quality and promote long-lasting, sustainable growth.

The interdependency between trust, commitment and quality of customer service highlights the important role that the following play in creating trust between employee and employer:

- The provision of a sales-conducive retail environment and climate with supportive merchandising facilitating physical customer engagement and empowering retail staff to assist and guide customers through the engagement phase is a non-negotiable (Wilder *et al.*, 2014:447; Zhang *et al.*, 2020:182).
- Staff interactions and engagements focused on promoting enjoyment, feelings of care, friendliness, personal relationships, authentic understanding, and personal connection (Zomerdijs & Voss, 2010:79).

- Retail staff should possess appropriate skills and adequate resources and receive sufficient support to demonstrate adaptive engagement behaviour and deliver adaptive sales offerings (Wilder *et al.*, 2014:446).
- Staff participation, Jurburg *et al.* (2019:361) call for employees to have greater influence over how they carry out their daily operations and seeking their voice is believed to be beneficial for both employees and employers. Employee participation is key in successfully implementing quality and improvement management initiatives”.
- Staff engagement, Abhari *et al.* (2021:3) state that “employee engagement is critical in building positive employee experiences. For example, the level of employees’ emotional engagement determines their commitment and productivity.

The important role retail store managers play in retail staff is highlighted by Locke *et al.* (cited by Kantabutra, 2008:338), who states that “setting an example - given that motivation of staff is the only direct predictor in the present study, retail store managers should always act as a role model for staff, build staff’s self-confidence, create. More precisely, Locke *et al.* (1991) assert that effective leaders motivate their followers through “the use of formal authority, role modelling, building self-confidence creating challenge through goal setting, delegating, and rewarding and punishing”. These assertions are supported by Cherry (2023) in explaining how transformational leadership can inspire others.

In evaluating the five themes that emerged from Question 12 responses and supporting extant literature, the possibility of a golden treat between the themes led to further data analysis and reduction that resulted in identifying one emerged theme, as shown in Table 8-6.

Table 8-6: Question 12 consolidated theme

Themes	Consolidated theme
Training	Leadership
Goalsetting	
Management	
Business acumen	
Trust	

Most participants (thirteen) believe a mismatch exists and identified several root causes that can be ascribed to the mismatch. The root causes were synonymous with the five themes and can be categorised under one overriding theme: retail leadership. Retail management requires retail

leadership “to engineer the customer’s experience in such a way as to create value both to the customer and the firm” (Verhoef *et al.*, 2009:38).

Kantabutra (2008:323) thinks that “retail store managers should develop a store vision characterized by the seven vision attributes of brevity, clarity, future orientation, stability, challenge, abstractness, desirability, or ability to inspire and containing reference to store leadership. They should also communicate such vision to staff, align organisational components with the vision, and empower and motivate staff.

At the core of retail leadership should be an in-depth understanding of customer needs, wants and expectations, serving as a comprehensive platform for sustainable in-store customer experiences (Accenture, 2015; Lemon & Verhoef, 2016:69; Verhoef *et al.*, 2009:31). Each of the five themes relates to the five critical success factors ascribed to retail store efficiency by Thomas *et al.* (1998:498,499). These factors include labour, experience (tenure), location-related costs, internal processes, and store performance.

The five themes also relate to the four vision realisation variables (vision communication, organisational alignment, empowerment, and motivation) identified by Kantabutra (2008:326). It is these critical success factors (Thomas *et al.*, 1998:498) and vision realisation variables (Kantabutra, 2008:326) and the 7C customer focus model developed by Madhani (2022:20), that form the building blocks for the final emerged theme, customer experience vision and strategy.

The next section deals with the findings related to Section C of the qualitative study. Section C of the interview guide focused on participant perceptions on the concept of customer experience and what can be regarded as drivers for customer experience.

8.3.3 Findings of Section C - Conceptual retail store customer experience management model constructs

Section C focused primarily on the 12E constructs included in the conceptual customer-centric experience management framework as illustrated in Chapter 1 and repeated in Figure 8-1. The 12Es comprised the Expect, Expose, Excite, Enter, Explore, Experience, Engage, Embrace, Execute, Exit, and Enhance constructs, as discussed in detail in Chapter 5 of the study.

This section forms the primary focus of the qualitative study that supplements the qualitative study and endorses the rationale, purpose, and benefits of the sequential explanatory mixed methods research methodology followed in the study (Chapter 6).

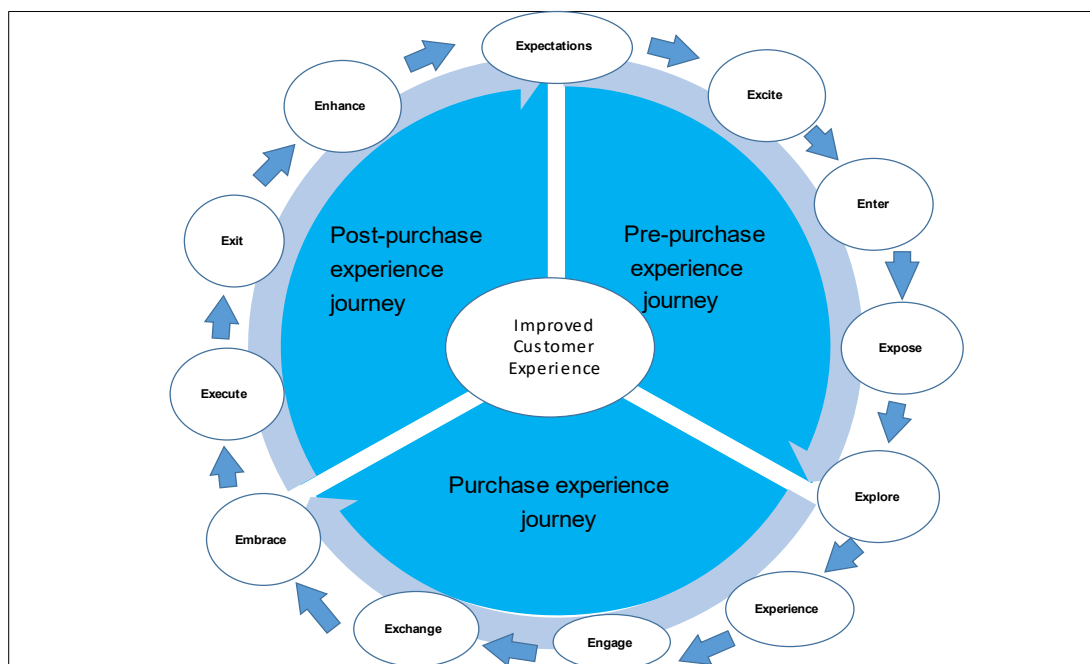


Figure 8-1: Conceptual customer-centric experience management framework

8.3.3.1 Structure of Section C

Participants were asked two introductory questions, the first to understand the concept of customer experience (Question 13), followed by inputs on the drivers for consistently high customer experience ratings (Question 14).

Participants were then presented with the study's conceptual management framework, consisting of twelve key constructs (12Es). These constructs, as illustrated in Figure 8-1, represent the drivers of customer experience and focus on promoting and enhancing customer experiences within retail stores. They were surveyed through Questions 15.1 to 15.12. Each of these drivers comprises action-orientated tactics that should, by default, be included in any retail customer experience journey adapted to fit the context of a particular retail entity.

Participants were requested to:

- Consider each of the key twelve drivers concerning its applicability, validity, and efficacy in influencing retail customer experiences. This is to confirm, corroborate, and triangulate the qualitative responses from retail management with the findings from the study's quantitative study (Chapter 7) that focussed on the opinions of active retail customers.

- Indicate pragmatic retail-orientated tactics to support the implementation of each driver within the retail environment to improve customer experiences.

The next section deals with the findings of Questions 13 to 15.17 as supported by thematic analysis outcomes illustrated in the study's Appendixes (E.1 – F.5). These findings, discussions and extant literary support provided the foundation for summarised versions of analysed results as and where applicable. This approach ascribes to the study's qualitative research methodology as described earlier in the chapter (paragraph 8.2).

8.3.3.2 Findings of Question 13: “What is your understanding of the concept of customer experience?”

Table 8-7 reflects the reduction of categories into themes resulting from the analysis of participant responses in Appendix E.1.

Table 8-7: Categories and themes associated with Question 13

Categories	Themes
Authentic journey (12)	Journey (14) Revenue (6) Expectations (3)
Churn (1)	
Referral (1)	
Revenue (2)	
Retention (2)	
Expectations (3)	
Atmospherics (1)	
Staff (1)	

Most participant responses (fourteen) associated customer experience with a customer journey consisting of an array of interactions between the customer and the retail service provider (whether resulting in a purchase or not). In essence, it characterises a relationship between a business and its customers. A relationship that starts before entering a retail store, entrenched during in-store interactions with friendly, confident faces, and the level of service and professionalism given to every customer makes them want to return to the store after exiting the store.

Customer experiences were also associated with a focus on revenue generation. Six participants refer to the positive impact of customer experience on churn, customer referrals, retention, customer satisfaction and maintaining customer centricity. All these factors contribute

to a retail entity's success and positively impact the potential to create revenue and advance the profitability of retail stores.

The remaining three participant responses stressed that customer experience implies meeting and exceeding expectations, providing customers with more than expected.

The following participant responses support the identified themes:

Journey

- Participant 1: "Is all the interactions customers have with your company at all stages of the customer journey—even if it doesn't result in a purchase. It focuses on the relationship between a business and its customers".
- Participant 4: "Customer service starts from the time the customer enters the store (look and feel) friendly confident faces to the level of service and professionalism given to every customer making them want to return to the store".
- Participant 11: "It is the interaction between a customer and an organisation through the customer journey, so although a customer may receive excellent service at the point of sale, it can all be ruined later if, for example, a delivery is delayed, a bill is invoiced incorrectly etc."

Revenue

- Participant 2: "CX drives advocacy, which again drives churn and recommendation and results in revenue."
- Participant 4: "Customer service starts from the time the customer enters the store (look and feel) friendly confident faces to the level of service and professionalism given to every customer making them want to return to the store."
- Participant 5: "Customer should get the best service as they bring in revenue to the business."

Expectations

- Participant 6: "Going the extra mile to obtain customer satisfaction and maintaining customer centricity."
- Participant 9: "Giving customers more than they expect at all levels."

- Participant 15: “Valuing customers’ time, having a pleasant attitude, and providing knowledgeable and resourceful resources, but that you also take things a step further to exceed rather than just meet expectations.”

The following extant literature bears out the three themes constituting responses for Question 13:

Sparks (1992:165) contends that “business is simply about” creating, retaining, and enhancing customer relationships. Kumaradeepan and Pathmini (2015:28) state that “creating a strong connection with customers is the dream of any marketer, especially in the service sector”. The basis for a sustainable business model in the service industry thus lies in the understanding of what customers value, the creation of such value and the delivery thereof through authentic relationships as optimally as possible (Graf & Maas, 2008:2; Payne *et al.*, 2017:467).

The aim of retail business management should be to build “positive, participative, and long-lasting relationships that are appealing to a customers’ needs and value perceptions and create sustainable, profitable growth” (Verhoef *et al.*, 2009:32). In doing so, customer experience will have a positive influence on retail patronage, store loyalty and thus customer profitability (Baker *et al.*, 2002:138). Hollenbeck *et al.* (2023:10) refer to the aspect of sustainable relationships and suggest that as long as individuals experience perceived benefit (value) from their brand interactions, they are predicted to continue reciprocating with (engaging with) the object, thus prolonging their journey with the firm.

Johnston and Kong (2011:6) and Meyer and Schwager (2007:119) postulate that the root cause of the perceived gap lies in companies being oblivious to, and do not fully understand, the experience needs, requirements, and expectations of their target markets and do not account for it in the design of appropriate retail store customer experience journeys. Brodie *et al.* (2011:5) believe that a prerequisite for engaging customers is to provide perceived relevant, valuable offerings conducive to yielding customer-based experiential and symbolic value. These sentiments are supported by Hollebeek and Macky (2019:33) from a digital content marketing research perspective.

Hollebeek *et al.* (2023:20) suggest that customer journeys should be developed to “offer elevated levels of customer-perceived value” and to enable engaged buyers “as engaged buyers have been shown to spend more with the firm, exhibit a higher share-of-wallet, and yield higher overall profitability”.

Following participant responses on their understanding of customer experience, Question 14 invited participants to identify what they perceive to be drivers for high customer experience ratings.

8.3.3.3 Findings of Question 14: What do you perceive to be the drivers for consistently high customer experience ratings?

Table 8-8 reflects the categories and themes resulting from the analysis of participant responses as contained in Appendix E.2.

Table 8-8: Categories and themes associated with Question 14

Categories	Themes
Skills (13)	Skills (13) Strategy (9)
Atmospheric (3)	
Business processes (3)	
Strategy (3)	

Participants placed a high premium on the important role of retail store staff and their skills in enabling customers to live through pleasant and rewarding retail store experiences. Thirteen participant responses emphasised the role of staff training, particularly the importance of interpersonal skills on customer experiences. Nine participants expressed the importance of sound retail strategies and tactics associated with retail shopping space, atmospherics and supporting retail business processes required to create and maintain favourable customer experiences.

The following themes emerged from the analysis in Appendix E.2:

Skills

- Participant 1: "Product knowledge, creative thinking, active listening, maintain a positive attitude".
- Participant 4: "A store that has friendly, confident, and knowledgeable staff".
- Participant 13: "The drivers for consistently high customer experience ratings are the personal connection made with each customer and making the customer feel important by showing CARE (we will take care of them and solve the problem)".

- Participant 15: "Listening, understanding your customer's needs, thanking the customer, and promoting a positive, helpful, and friendly environment will ensure they leave with a great impression".

Strategy

- Participant 7: "Consistency, going above and beyond, commitment, service delivery. seamless service from various departments within companies."
- Participant 8: "Environment, product knowledge, communication, sales process, feedback."
- Participant 10: "Extrinsic motivators (quick "wins") that are motivated by intrinsic values (more long-term and purpose related/ driven)."

The following extant literature bears out the two themes constituting responses for Question 14:

Verhoef *et al.* (2009:32) define customer experience as a holistic construct that is "involves the customer's cognitive, affective, emotional, social and physical responses to the retailer". This multi-sensory construct requires high staff interpersonal service quality (Baker *et al.*, 2002:137). Research by Demoulin and Willems (2019:303) shows that customers perceive the lack of available, friendly, and competent staff as the most irritating environmental factor in the retail purchase process. Amer and Rakha (2022:20) support this finding as also relevant to the hotel industry and state that managers "should train the front-of-house employees to deal with customers politely and pleasantly and induce hotel staff to adopt a customer-oriented approach with customer convenience as a top priority".

Though the role of retail staff in ensuring high levels of customer experience is an important driver, retailers should not neglect other drivers that complement the staff role. These drivers include store ambience, space, signs, symbols, and artefacts (Bitner, 1992:60). It also includes store design (Baker *et al.*, 2002:121), the physical environment (Vos & Zomerdiijk, 2007:105), assortment and retail atmosphere (Verhoef *et al.*, 2009:32), retail processes and control features (Ding *et al.*, 2010:103), service interfaces (Fatma, 2014:38) social features, service scape engagement dimensions and surround scape dimensions (Amer & Rakha, 2022:20; Sheng *et al.*, 2016:4).

The next section deals with each of the 12Ess of the conceptual customer-centric experience management framework separately. In Section C, Questions 15.1 to 15.12 of the qualitative study, retail management and training participants were questioned on:

- (a) The impact (applicability, validity, and efficacy) of each of the 12E drivers on customer experience and the resultant themes that emerged from participant responses.
- (b) Pragmatic retail store tactics could be considered to stage, support and manage the twelve key drivers (Bempost, 2023).

8.3.3.4 Findings for Questions 15.1a and 15.1b regarding customer expectations

Customer expectations ('Expect') represent the first 'E' driver of the twelve drivers that comprise the 12E experience management continuum, as illustrated in Figure 8-1. This section presents the findings of Question 15.1a and Question 15.1b.

A detailed analysis and theme extraction of these two questions are contained in Appendices E.3 and E.4.

The themes associated with the questions are summarised in Table 8-9. The table first shows the findings of Question 15.1a regarding the impact of the Expect-driver on customer experience and the associated themes that originated from participant responses. The second part of the table shows the themes that emerged for Question 15.1 b that focus on the retail tactics suggested by participants.

Table 8-9: Customer expectations, impact on customer experience with suggested tactics

EXPECT-DRIVER				
Question 15.1a			Question 15.1b	
To what extent do you feel that determining and executing customer need-and-want expectations can impact customer experiences? Please explain.			Explain briefly what retail orientated tactics can be developed and implemented to determine, evaluate, and execute customer need-and-want expectations?	
Impact (n)			Themes	Themes
High	Low	No reply	Profiling	Needs
17	0	0		
			Journey	Training

Findings for Question 15.1a

All seventeen participants indicated that the 'Expect' driver constitutes the establishment of customer need-and-want expectations and plays an important role in customer experiences.

Participant responses highlighted the need for customer profiling, an in-depth knowledge and understanding of customer expectations, as a main driver for customer service tactics. Acknowledging customers' expectations increases satisfaction, reduces churn and after-sales service demands and drives a positive brand reputation.

Participants called for comprehensive customer expectation gap analyses as enablers to develop and implement authentic customer journeys that acknowledge customer expectations. These journeys should show retailers acknowledge and adhere to customer requirements and expectations and drive focused customer service tactics.

The following themes emerged from an analysis of Question 15.1a (Appendix E.3 as supported by participant responses:

Profiling

- Participant 2: "Very important, customer profiling (needs, requirements, behaviours, etc.) results in better journey design that results in CX".
- Participant 7: "It's extremely crucial to know your customer and be aware of his/her needs."
- Participant 13: "High impact - by determining what the customer needs and wants prevents comebacks, after-sales queries, etc.".
- Participant 14: "High impact - You need to know what customers are looking for so you can exactly provide the service they want".

Journey

- Participant 10: "It is critical to provide the customer with a unique, context-specific and tailored experience as opposed to a telesales/ marketing /one-size-fits-all all experience. If incorporated in every step of the process, i.e., the agent's tone of voice, mannerisms and choice of vocabulary tailored to the customer's level of understanding and frame of reference, it can have a lasting impression."
- Participant 15: "Impacts on product knowledge, keeping in constant contact with the customer for feedback, going an extra mile."
- Participant 17: "Knowing expectations - you are able to provide solutions easily, which will result in your services being efficient."

The emerged themes for Question 15.1a are interconnected and are validated by the following extant literature:

Customer journey design refers to the extent to which customers perceive touchpoints designed in “a thematically cohesive, consistent, and context-sensitive way” across multiple service marketing, service operations, interaction design disciplines (Homburg *et al.*, 2017:386; Kuehnl, 2019:553, Patri´cio *et al.*, 2018:3,). Embedded into customer retail journey design should be an acknowledgement of the role and function of intuitive touchpoint experience stimuli in customers cognitive, affective, emotional, social, and physical responses to retailers (Giacomin, 2014:610; Lemon & Verhoef, 2016:70).

Service innovation has an important impact on customer behavioural intentions and experience and on experiential design (Su, 2011:425). The reverse also applies as a deeper understanding of customer behavioural intentions and customer decision journeys opens opportunities for service innovation through customer journey design (Lemon & Verhoef, 2016:85).

An important requirement for service elements to be intuitive is for touchpoint sensory stimuli to be observable, accessible, and physically and emotionally experienced by customers. The information and meaning of sensory stimuli should be obvious to customers, and the intended emotion-inducing features and entrenched intelligent behaviours it evokes should be well-matched with customer needs, wants and behavioural intentions (Giacomin, 2014:610).

These stimuli should be derived from products, services, staff, and the environment and are available for customers to be scanned and filtered. This should enable customers to assess if organisations have the ability and are suitability to satisfy their needs and wants and to provide a quality experience (Berry *et al.*, 2006:44; Bitner, 1998:65; Francioni *et al.*, 2018:336; Otnes *et al.*, 2012:367)

Though the ‘what’ and ‘how’ of the service delivery system are important, the comprehensive and detailed deconstruction (Hill *et al.*, 2022:125; Otnes *et al.*, 2012:368) of service should also include an analysis of the where, who, when, why and with what for the formulation of the most appropriate operational tactics. This identifies, specifies and defines the constituent parts of service tactics. The parts should be incorporated into a customer-centric service delivery package that integrates service interaction components that comply with customer requirements (Goldstein *et al.*, 2002:122).

Customer journey design should be done from the vantage point of the customer, including its needs and wants, expectations, state of mind, emotional responses, as well as “barriers and

motivators for action” (Varnali, 2019:823) as perceived performance depends on customer expectations (Eren, 2021:305).

Findings of Question 15.1b

Participants were requested to identify and explain what retail-orientated tactics can be developed and implemented to determine, evaluate, and execute customer need-and-want expectations.

Research surveys, loyalty cards, SMS to customers, customer feedback forms, and customer audits were some of the externally focussed data gathering tactics suggested by participants. Participants also suggested that retailers supplement their data-gathering techniques by focusing on formal staff feedback sessions, staff team meetings and training on attentive listening skills.

Participants suggested that the objective of data-gathering tactics should be to understand the fundamentals of customers’ retail expectations through detailed customer needs analyses. Customer needs and wants analyses should enable retailers to develop content-specific customer journeys to impact customer experiences and provide a sound basis for customer strategies and service tactics.

The outcome of customer needs analysis should be an important input to retail staff training interventions and service programs. The latter could also include interactive tools that enable customers to compare deals, benefits, and costs. Other suggested tactics were developing flexible offerings and bundled deals to suit customer lifestyles and budgets.

Two themes emerged from Question 15.1b, as analysed in Appendix E.4 and reflected in Tables 8-8 and 8-9. These themes were customer needs (which ties in with customer profiling as identified in Question 15.1a) and staff, as supported by the following participant responses:

Needs

- Participant 1: “Reflect on our service, observe staff behaviour, gather data from customers.”
- Participant 2: “Customer behaviour and shopping patterns can be derived from different data points including loyalty cards to ensure targeted campaigns and service delivery.”
- Participant 3: “Attentive listening to the customer and making sure that the customer needs are fully addressed.”

- Participant 9: “Feedback in store, by phone or SMS - After sales correspondence. Suggestions and recommendations.”
- Participant 10: “Customer Profiling, Feedback Forms, evaluating and discussing the feedback and implementing this feedback in applicable areas continuously.”
- Participant 13: “We can start with service from the heart, accurate short customer ratings, and customer service auditing. The stores need a new fresh inviting look and redesigned branding logo.”

Staff

- Participant 4: “Product and system training is critical as well as understanding the product and systems, regular refreshers and performance reviews must be done to ensure the agent is still able to perform his duties as per the companies' provided policies and procedures and KPA.”
- Participant 5: “Training should constantly be put in place”.
- Participant 12: “Constant staff training and daily scrums”.

The two themes, broadly described as customer needs analysis and staff training, are borne out by extant literature as follows:

The criticisms of the customer experience theory are that 1) its scholars and practitioners are oblivious to customer needs, 2) the limited range of interactions during the customers' experience, 3) the key retail elements associated with these interactions, and 4) how it differs across interaction experiences, can be abridged through a customer needs analysis (Otnes *et al.*, 2012:368). In this regard, Norton and Pine II (2013:12) argue for the “rigorously developing” of knowledge and a deep understanding of customers' needs and expectations. This deep understanding is essential to operationalising and aligning each of the 12E constructs to customer experience objectives.

Gulati and Oldroyd (2005:97) reason that the answer to the primary organisational objective of understanding a customer can be found in a four-stage process. It is postulated that the following process is universal and can also be applied to an in-store retail environment:

- First stage - Collating, standardising, and organising all customer interaction and other relevant customer information.

- Second stage - Analysing collated customer information by business analyst experts drawing inferences to gain insights into customer needs, expectations, and behaviour.
- Third stage - Coordinating of customer information to develop an understanding of likely future customer behaviour.
- Fourth stage – The learnings from the preceding three stages are brought together and applied to day-to-day retail operations. It represents a real time response to customer needs including the alignment of training programmes, informal values, and daily behaviour of retail store staff to satisfy customer needs.

Extant literature's support for customer need-and-want data collection also applies to the collection of customer feedback while customers are on their journeys through the retail store. The evaluation and analysis of such feedback should enhance the in-store customer journey to ensure a higher level of customer experience, resulting in stronger exit barriers from the retail entity's customer base (Voorhees *et al.*, 2017:278).

Gulati and Oldroyd (2005:97) reason that the answer to understanding a customer can be found in a process that resembles a process of experimentation. Customer behaviour is predicted, various interventions are tested, tried, and measured, and feedback from retail staff is obtained to effect changes to customer interventions where required. The process of experimentation also applies to the enhancement of customer journeys, which should be based on customer feedback and organisational experiences and primarily focus on adapting and improving future service experiences (Schögel & Lienhard, 2020:889).

It is also important to constantly align training programmes, informal values, and daily behaviour of retail store staff to satisfy customer needs (Gulati & Oldroyd, 2005:97). Hennig-Thurau *et al.* (2006:70) in highlighting the need for retail staff training, suggest the application of perspective-taking techniques, to enable engagement through deep acting staff behaviour. Wilder *et al.* (2014:447) indicate that it is important for retail management to communicate their expectations to sales staff and create a conducive environment through skills training, provision of resources and management support to realise and deliver on stated expectations.

The focus should not only be on formal training programmes. Retailers are encouraged to explore the application of informal training elements. Kaila (2021:192) suggests the “application of management of job roles, responsibilities, and behaviours, e.g., job rotations of employees between teams, mentoring and shadowing, motivating, knowledge sharing and practising inclusiveness”. “Building a learning culture is extremely important in a store environment. So

that all the store's frontline staff provide a similar service experience to the customer. All the store staff members should speak the same language” (Kaila, 2021:192).

8.3.3.5 Findings for Question 15.2a and 15.2b regarding customer exposure

Questions 15.2a and 15.2b examined participants' opinions and suggestions regarding the second ‘E’, ‘Expose’, of the 12E experience management continuum.

An analysis of the responses to these two questions is contained in Appendices E.5 and E.6. Themes associated with these two questions are summarised in Table 8-10.

Table 8-10: Customer exposure, impact on customer experience with suggested tactics

EXPOSE-DRIVER				
Question 15.2a			Question 15.2b	
To what extent do you feel that exposure to physical in-store evidence of adherence, or not, to customer experience expectations, can have an impact on customer experiences assessments? Please explain.			Explain briefly what retail-orientated tactics can be developed and implemented to expose customers to physical evidence at pre-purchase, purchase, and post-purchase stages, showing that retailers execute on customer experience expectations?	
Impact (n)			Themes	Themes
High	Low	No reply	Trust	Merchandising
16	0	1		
			Merchandising	Staff
			Atmospherics	Atmospherics

Findings of Question 15.2a

Sixteen out of seventeen participants indicated that exposure to physical in-store evidence of retailers' adherence to customer experience expectations can impact how customers experience retail stores.

Participants believed that exposing customers to physical in-store evidence of adherence to their experience expectations builds trust and eliminates surprises and anxiety. In-store evidence includes friendly staff, a conducive shopping environment, the application of ease of shop and the application of technology.

Participants suggested that retailers should expose customers and permit and enable them to experience, touch and test merchandise. Showcasing the practical and economic value of merchandise supported by good, friendly, and supportive staff engagements can be beneficial to building value for customers. Retailers should create conducive shopping environments by merchandising products and services, enabling customers to experience merchandise and positive staff interactions.

The following themes emerged from Question 15.2a (Appendix E.5), exhibiting the impact of exposing customers to evidence that retailers adhere to their expectations:

Trust

- Participant 1: “The main reason consumers prefer to shop in physical stores is to see, experience, and test products in person before buying. A physical experience can dispel doubts and help close the sale. This can reduce the chance of a product being returned.”
- Participant 2: “If not complied with, it can result in even more customer frustration and more irate customers.”
- Participant 9: “This will eliminate surprises and anxiety around what to expect at what point. Seamless experience.”
- Participant 17: “It builds trust or lack thereof.”

Merchandising

- Participant 1: “The main reason consumers prefer to shop in physical stores is to see, experience, and test products in person before buying. A physical experience can dispel doubts and help close the sale. This can reduce the chance of a product being returned.”
- Participant 2: “If not complied to it can result in even more customer frustration and more irate customers.”
- Participant 3: “In most instances, the live demo units are an integral part of making the customer have a feeling of the device they are interested in.”
- Participant 4: “Showing the customer physical evidence related to the service the customer came to the store for will substantially show what the agent is explaining is correct based on physical evidence.”

- Participant 11: “High - many customers would like to feel and experience a product before deciding to purchase.”

Atmospherics

- Participant 5: “The store should be presentable, and the staff cleanliness should be the top priority.”
- Participant 13: “Physical in-store evidence has a significant impact on customer experience assessments. When a store meets or exceeds customer expectations in terms of cleanliness, organisation, and helpful staff, it leaves a positive impression. This enhances the overall experience and builds trust. Conversely, failing to meet these expectations can lead to a negative experience and deter customers. In-store evidence shapes perceptions and influences customers' assessments, so creating a physical environment that aligns with expectations is crucial for fostering positive experiences.”

These three themes, trust, merchandising, and atmospherics, are borne out by extant literature:

Press and Cooper (2016:69) suggest that applying service design principles and methodologies in designing a customer journey can create such exposures and act as an enabler of experiences. This requires the meticulous planning and organising of multiple, multifaced business elements. These elements of exposure should incorporate retail operating systems, touch point processes, service staff, products, services, levels of interactions and interfaces, the application of customer cues and the utilisation of environmental atmospheric space to provide a framework within which the journey takes place (Bodine & Hagen: 2013:16).

The service design process should be based on a thorough understanding of customers' needs and wants and their everyday use of products and services. Cain (1998:11) defined a process as experienced-based design (EBD). This understanding can translate into service quality, impacting customer satisfaction if “based on reliability and responsiveness, as employees' ability at the point of sale to provide attentive service and reliable information” (Faria *et al.*, 2022:194).

Findings of Question 15.2b

Participants suggested that retail tactics that can expose customers to physical evidence of retailers acknowledging customer expectations should include physical demonstrations and providing proper merchandise content to enable comparisons and create an authentic customer journey. Attention to staff engagements, interactive flow processes, and store atmospherics, such as segmentation into different exposure areas, gaming and technical areas supported by trained staff, were also suggested by participants.

Three themes emerged from the analysis of responses to Question 15.2b (Appendix E.6). The themes, merchandising, staff, and atmospherics characterised the most important retail tactics aimed at exposing customers to physical evidence.

Merchandising

- Participant 1: “Offer valuable and proper content, ask customers for feedback, create loyalty programmes.”
- Participant 3: “The different live demo units for a customer to experience the different advantages and disadvantages of what they are interested in”.
- Participant 10: “Live proof of comparisons made between visions, purchase and feedback.”
- Participant 14: “Tangible proof that establishes credibility and includes the look and feel of your product.”

Staff

- Participant 4: “Sticking to policies and procedures set out by the business will ensure the agent knows what must be done in every situation. All queries should be started by dissecting the customer's request, and from there, the proof is needed being either an invoice, statement, or contract etc., falling back to the agent's knowledge on obtaining these documents by being fully trained on what documents would be needed and where to get these documents that agents can access.”
- Participant 8: “Keeping in contact with the client, understanding customer needs, listening skills and being able to execute the sale, feedback, after-sales contact for referral.”

Atmospherics

- Participant 2: “Physical evidence should be the store cleanliness, friendliness of staff, no long queues in the store, etc.”
- Participant 9: “A step-by-step card summarizing the purchase Authentic journey - What, who, when and how.”
- Participant 13: “Retail-oriented tactics such as attractive window displays, well-trained staff, interactive product demonstrations, transparent pricing, seamless payment

options, personalized follow-up, and loyalty programs can expose customers to physical evidence at pre-purchase, purchase, and post-purchase stages, showcasing retailers' commitment to executing on customer experience expectations.”

Tactics associated with the three themes, to yield the advantage of exposing customers to in-store evidence, are supported by extant literature:

Lieberman (2021:119) suggests that retailers are challenged constantly to stay relevant in the market, make their brands more acceptable to customers, and engage with consumers effectively and meaningfully. Creating and displaying in-store evidence of retailers adhering to customer requirements is an ongoing service design journey to find new, refreshing and rewarding ways of exposing and persuading customers to engage and persevere with retailers, their brands, and their staff (Lieberman, 2021:119).

It has been proven that customers' cognition, mood, emotions, and behaviours involve various sensory modalities to be accounted for in merchandising applications and staff engagement tactics (Roggeveen *et al.*, 2020:130). Successful execution of these capabilities results in meaningful and improved customer engagements that can lead to psychological ownership, higher customer loyalty levels and sustained competitive advantages in the marketplace.

Baker *et al.* (2002:138), Dawes and Rowley (1998:350-356), Lieberman (2021:220) and Schmitt (2003:14), believe that this can be achieved through designing service-facing interfaces to develop and implementing a customer experience continuum of interface activities that can reveal in-store adherence to customer requirements and expectations. Research done by Faria *et al.* (2022:195) confirmed and reinforced these opinions in establishing the “importance of employees' quality and store design in retail sector competition”.

8.3.3.6 Findings for Question 15.3a and 15.3b regarding exciting customers

The third 'E' driver of the 12E experience management framework, 'Excite', was surveyed through Questions 15.2a and 15.2b. The themes associated with participant responses on the 'Excite' driver as analysed (Appendix E.7- E.8) are summarised in Table 8-11.

Table 8-11: Customer excitement, impact on customer experience with suggested tactics.

EXCITE-DRIVER				
Question 15.3a			Question 15.3b	
To what extent do you feel that retail customers want to experience exciting, pleasant, and rewarding retail experiences, and what impact does this, or the lack thereof, have on customer experience assessments? Please explain.			Explain briefly what retail-orientated tactics can be developed and implemented to excite customers and positively impact customer experience assessments.	
Impact (n)			Themes	Themes
High	Low	No reply	Value perceptions	Skills
16	0	1		
			Staff	Social media
				Atmospherics

Findings of Question 15.3a

Participants indicated that customers experiencing exciting, pleasant, and rewarding retail experiences could impact customer experience assessments. They associated these experiences with providing value to customers through merchandising and atmospheric elements that include product variety, competitive pricing, conducive interactive store layouts and efficient shopping processes. Participants claim that exciting customer experience leaves people feeling heard and appreciated.

Customers are also excited by the appreciative, friendly, and well-trained staff. They look forward to a heartwarming experience when they visit a retail outlet. This treatment minimizes friction, maximizes efficiency, and maintains a human element. The impact of meeting these expectations is positive customer experience assessments, loyalty, and recommendations. Failing to deliver on these desires can result in dissatisfaction, negative word-of-mouth, and decreased loyalty. Participants mentioned that customers always want to feel special and appreciated.

Participants noted that in-store merchandising and store atmospherics should support and substantiate advertising messages. Incorporating relatable and human experiences into advertisements driven by artificial intelligence (AI) could make a difference to younger and older customers.

Customers value product variety, good pricing, conducive interactive store layout and efficient shopping processes. Participants indicated that creating customer excitement can impact customer value perceptions, influence retail staff training, behaviour and service delivery and impact advertising tactics.

The following themes emerged from an analysis of Question 15.3a (Appendix E.7) supported by participant responses:

Value perceptions

- Participant 1: “Exciting layout draws customers to a store, a variety of product offerings allow customers an opportunity to choose, price is also an important factor to draw customers and influence decisions.”
- Participant 3: “Pricing and product availability especially when it is a promotional item.”
- Participant 8: “Brochures showing value for money, advertising exciting deals, contacting customers either via Email, calls and offering exciting deals.”

Staff

- Participant 2: “Customers want to have physical evidence that they matter to the retailer – whether it is friendly & polite staff or personalised messaging and offers.”
- Participant 13: “Retail customers greatly desire exciting, pleasant, and rewarding experiences. The impact of meeting these expectations is positive customer experience assessments, loyalty, and recommendations. Failing to deliver on these desires can result in dissatisfaction, negative word-of-mouth, and decreased loyalty. Thus, fulfilling customer expectations for engaging retail experiences is vital for business success.”

Emerged themes are supported by extant literature:

Creating and instilling customer excitement in the prepurchase stages has the potential to motivate customers to interact with a retail business or store (Dunn & Davis, 2003:35). This is important as Lange *et al.* (2016:1014) state that the main challenge for retailers is to convert consumers into shoppers.

The communication of retail store value propositions through various touchpoints can act as cues or units of stimulus, attracting prospective customers and influencing customer experiences. (Becker & Jaakkola, 2020:639). In this regard, Jain *et al.* (2017:649) refer to the need to orchestrate a series of integrated cues that “collectively create a deep-seated

preference for a particular experience". It should imply products and service attributes that pleasantly surprise and generate "delight" differentiating the retail entity from its competitors (Fuller & Matzlet, 2008:116,117).

Retail staff's comprehension of the fact that the objective of retail excitement cues is to seize a customer's attention and to incite curiosity is important (Siebert *et al.*, 2020:49). Staff communication can include emotional evocative cues (Hill *et al.*, 2016:1029) inciting customer curiosity enabling retailers to connect with customers in ways that can influence customer behaviour (Hill *et al.*, 2016:1028).

However, in addition to staff in-store communication that can influence and impact customer excitement, marketing communication also plays an important role in creating prepurchase excitement. Lim and Kim (2018:143) suggest that the key should be to enable customers to visualise the visible and invisible areas of a specific type of service, the essential aspects of the service and the service delivery process.

Brand-related cues such as brand design and identity, advertisements, brochures, Web sites (marketing communication), retail store location and atmospherics (Brakus *et al.*, 2009:53), anything that can be perceived or sensed by the customer (Becker & Jaakkola, 2020:639) in the pre-purchase stages, can create excitement.

Findings of Question 15.3b

Participants placed a high premium on the existence of staff demonstrating appropriate levels of interpersonal skills, sales skills, and specialist functional skills. The application and utilisation of social media to engage, interact, and create expectations and excitement were suggested by participants as tactics that retailers should consider creating higher excitement levels among their customers. These tactics should be backed by a conducive shopping environment showcasing the latest trends and promotional offerings in specified merchandised shopping zones.

The analysis of participant responses in Appendix E.8 highlighted five categories that were reduced to three themes. These themes characterised retail store tactics that promote excitement among retail customers. The three themes suggested a focus on retail staff skills, the application of social media and the creation of a conducive shopping environment, as supported by the following participant responses:

Staff

- Participant 4: “Staff that always greet with a friendly smile no matter if the customer is there for a sale or a query. a clean store leaves the sense of an organized and well managed team that takes pride in what they do.”
- Participant 16: “Customer orientation is a business approach in which a company solves for the customer first. It's all about focusing on helping customers meet their goals. Essentially, the needs and wants of the customer are valued over the needs of the business. For customer service, this means your support team is focused on meeting customer needs.”
- Participant 9: “Have a dedicated floor walker/customer relations agent/in-store host. Someone to walk the customer through the store - Q&A and info sharing about specials and promotions. Separate from the actual selling person/order processor.”

Social media

- Participant 7: “Keep customer informed, clear and concise explanation in respect of billing, delivery, knowledgeable agents in stores, build repour with customer explain benefits of different products.”
- Participant 15: “Create engaging content especially on platforms like TikTok, Instagram and Twitter.”

Atmospherics

- Participant 8: “Brochures showing value for money, advertising exciting deals, contacting customers either via Email, calls and offering exciting deals.”
- Participant 13: “To excite customers and positively impact their experience assessments, retailers can create visually appealing stores, offer interactive experiences, provide personalized customer service, offer unique products, organize engaging events, provide convenient omnichannel experiences, and use technology for enhanced shopping (like improving mobile apps for easy browsing and personalized recommendations). These tactics aim to exceed expectations, increase satisfaction, and foster loyalty.”

The three themes (skills, social media, atmospherics) that emerged from customer responses are supported by extant literature:

In referring to the concept of services marketing, Vargo and Lusch (2004:2) postulate that the result of the evolutionary development of marketing from tangible goods towards a focus on services emphasises staff knowledge, skills, exchange processes and relationships. A basic premise for a service-dominant logic approach is that companies' strategic benefits reside not in operand (tangible) resources but in operant (intangible) resources such as human skills, knowledge bases and process management capabilities (Vargo & Lusch, 2008:7; Vargo & Lusch, 2004:6-12).

The application of technology, especially social media, in retail is a sign of retail service innovation that has a meaningful impact on customer behavioural intentions and experience and on experiential design (Su, 2011:425). These tactics revolve around the design of service elements (Patri'cio *et al.*, 2018:3), interactions (Patri'cio *et al.*, 2008:320) and engagements (Lieberman, 2021:219) into human-centred retail customer touchpoints. This represents an important approach to service innovation (Patri'cio *et al.*, 2018:3). The application of innovative resources goes hand in hand with a deeper understanding of customer behavioural intentions and customer decision journeys, opening opportunities for service innovation through customer journey design (Lemon & Verhoef, 2016:85).

Applying human-centred designs in retail should allow for updates and changes to the customer engagement cycle where and when required and needed. This can include implementing social media and other technology-driven delivery mechanisms and channels necessitated by customers' changing needs and wants. Bolton (2020:282) stresses the requirement for organisations and experienced designers to acquire scholarly knowledge to design flexible and resilient service networks, including social media applications, that support human-centred experiences.

These features highlight the ecosystem's umbilical cord with services marketing, S-D Logic, and service experience research (Helkkula, 2011:367). In both static and dynamic experiences, touchpoint environmental factors can influence customers' experiences. These factors include physical surroundings, store atmosphere, store cues (stimuli), journey experiences via an organisation's service system and the role played by all direct and indirect stakeholders in the service process.

In formulating a conceptual framework for the influence of multiple store environmental cues on perceived value and store patronage, Baker *et al.* (2002:121) merged research findings by Zeithaml and Bitner and integrated elements of cognitive, environmental psychology and other interrelated theories. The latter includes elements of the inference- (customers interpret and judge retail store cues and extrapolate to the unknown), schema- (previous experiences used

for prediction of service), and affordance (value assessments based on visual perceptions of a physical environment) theories.

Holbrook and Hirschman (1982), who have been accredited with the emergence of the concept of customer experience in marketing (Fatma, 2014:33; Kranzbühler *et al.*, 2018:434; Same & Larimo, 2012:481), argue for a broader view to influence customer emotions by promoting the inclusion of hedonistic elements of consumption that stimulate multisensory gratification (Holbrook & Hirschman, 1982:135,137; Hollebeek & Macky, 2019:27). These elements, functioning as behavioural drivers along a customer journeys and as behavioural factors influencing take up, are still relevant, even in the South African retail banking environment (FSCA Report, 2023:3, 33, 68).

8.3.3.7 Findings of Question 15.4a and 15.4b regarding customers' reception when entering a retail store

The fourth 'E' driver of the 12E experience management continuum, 'Enter, ' was surveyed through Questions 15.4a and 15.4b. Themes associated with participant responses, as analysed in Appendix E.9 and Appendix E.10, are summarised in Table 8-12.

Table 8-12: Customer entering, impact on customer experience with suggested tactics.

ENTER - DRIVER				
Question 15.4a			Question 15.4b	
To what extent do you feel that the reception at a retail store (ease of entry, welcoming and courteous) can influence customer experience assessments? Please explain.			Explain briefly what retail-orientated tactics can be developed and implemented to improve the store entry experience of customers.	
Impact (n)			Themes	Themes
High	Low	No reply	Tone setting	Staff
17	0	0		
			Staff	Technology
				Entrance atmospherics

Findings of Question 15.4a

Participants thought the reception at a retail store (ease of entry, welcoming and courteousness) could influence customer experience assessments. The importance of the 'Enter' driver resides in its tone-setting role for the total experience especially as it represents the first official contact

and call for staff assistance and direction. The latter implies that staff selection and training are important to secure a good customer experience when entering a retail store.

The following themes emerged from an analysis of participant responses (Appendix E.9), indicating the impact and importance of how customers should be treated when entering a retail store:

Tone setting

- Participant 5: “Very crucial, that's when you make the customer feel at home first impressions lasts.”
- Participant 13: “The reception at a retail store, including ease of entry and a welcoming and courteous atmosphere, can have a significant impact on customer experience assessments. It sets the tone for the entire shopping experience, making customers feel valued and appreciated, which positively influences their perception of the store and their overall satisfaction.”
- Participant 17: “Reception is the most important to the customer experience, authentic journey, as it sets an expectation for the customer through their store visit.”

Staff

- Participant 3: “Welcoming face that says I'm here to help you. Letting the customer explain what they need and not always interjecting while the customer explains.”
- Participant 15: “Having someone at the door to meet and greet the customers and also being assisted with agents who are friendly and understand what customer expectations and experience is.”

The two themes, tone setting and staff, are borne out by extant literature:

Retail customers entering a retail store are described by Voorhees *et al.* (2017:270) as the phase in a customer journey referred to as the “pre-core service encounter”. This is the phase where an early psychological connection with a customer is established, resulting in action to satisfy customer curiosity (Hill *et al.*, 2016:1029), and a desire from a customer to engage (Hapsari *et al.*, 2017:21). Setting the tone for the rest of the customer journey through access convenience is critical because nothing will happen until customers get in touch with the service provider (Keh & Pang, 2010:59).

Hennig-Thurau *et al.* (2006:71) state that the first step in a service script should be “eye contact with a customer and welcomes him or her to the store”. This step is supported by Otterbring (2017:288), who maintains that emotional contagion is said to be most influential in the early stages of a service encounter, suggesting that retail store entering can play a tone-setting role in a customer’s experience of a store.

Otterbring (2017:284) also suggests that “managers should encourage, and potentially train, employees to act in ways associated with positive emotions. Managers could also hire employees based on how good they are at acting and expressing themselves in a genuinely positive manner and create a pleasant store atmosphere so that the feelings and behaviours displayed by frontline employees are genuine rather than inauthentic”. In this context, Siebert *et al.* (2020:49) refer to the initiation of a “sticky journey” in which retail staff can give “potential customers a taste of the excitement to come as soon as their curiosity is sparked”. Retail staff thus play a critical success role in their welcoming and onboarding techniques (Siebert *et al.* (2020:50).

Findings of Question 15.4b

Participant responses on suggested tactics to enhance the entry phase of a customer journey primarily focused on the role of retail staff. Tactics include well-trained, professionally dressed and appropriately skilled hosts to greet customers on entry (as per the most important participant suggestions).

Participants stressed the value of an inviting store entrance due to the importance of the first customer contact at entry. Also, retailers should investigate and implement directional and guidance technology to further enhance customer entry and support retail staff in their customer reception endeavours.

The analysis of Question 15.4b participant responses (Appendix E.10) resulted in six categories: tactics associated with staff welcoming customers, hosting, staff wearing identification, merchandising, store atmospherics and the application of technology. Three main themes arose from the analysis, supported by participant responses:

Staff

- Participant 1: “Each staff member must be a friend/associate to customers, greet customers with a smile and charisma. Show customers that we are interested.”

- Participant 2 “A host at the door is critical to greet the customer and welcome customers. As above more complex sales require a store assistant to advice the customer and guide them through their purchase.”

Technology

- Participant 10: “AI recognition systems that greet and welcome returning and first- time customers, having the best solutions/ devices right at the entrance of the store or encouraging customers to interact with the latest and most interesting apps or functions of the specific device before deciding.”
- Participant 11: “Hosts should be equipped with tablets to capture customer details to be queued for service. Customers should have an option to book an appointment time.”

Entrance atmospherics

- Participant 4: “Neat, organized space displaying all the latest eye-catching deals.”
- Participant 16: “Have a good product and be persistent.”

The themes, staff, technology, and store entrance are supported by extant literature:

The importance and the role staff-orientated tactics play in a customer journey are extensively reported in extant literature and cited in several sections of this chapter (paragraphs 8.3.2.4, 8.3.3.2, 8.3.3.3). These literature validations, applicable to several other ‘E’- drivers, are also directly and indirectly related to the enter-phase of a customer embarking on a retail customer journey (Abhari *et al.*, 2021:3; Faria *et al.*, 2022:194; Roozen & Katidis, 2009:257; Siebert *et al.*, 2020:50).

The application of technology-driven delivery and support mechanisms, necessitated by the changing needs and wants of retail customers, are suggested by several researchers as referred to in multiple preceding sections (Bolton, 2020:282; Lemon & Verhoef, 2016:85; Lieberman, 2021:219; Patri´cio *et al.*, 2018:3; Su, 2011:425).

Fuller and Matzlet (2008:116) posit that retail store designs should be in “such a way as to grab the attention of customers, shape customer perceptions and expectations and create curiosity it can lead to customers being more inclined to visit a retail store”. Retail store entrances in particular, and store atmospherics and service scapes in general, can play a deciding role in creating satisfying customer experiences (Baker *et al.*, 2002:121; Bitner 1992:60; Ding *et al.*, 2010:103; Faria *et al.*, 2022:184; Fatma, 2014:38).

8.3.3.8 Findings of Question 15.5a and 15.5b, enabling customer explorations

Questions 15.5a and 15.5b investigated the importance and impact of exploring a retail store on customer experience assessments. It also prompted participants to discuss retail tactics that can be developed and implemented to promote and motivate customers to explore the store and its offerings.

Emerging themes attributed to the 'Explore' driver derived from the analysis of Questions 15.5a (Appendix E.11) and 15.5b (Appendix E.12) are summarised in Table 8-13.

Table 8-13: Customer exploring, impact on customer experience with suggested tactics.

EXPLORE - DRIVER				
Question 15.5a			Question 15.5b	
To what extent do you feel that customers who freely explore a store and its merchandise within an ergonomically well planned, clearly signed, specified, and structured layout can influence customer experience assessments? Please explain.			Explain briefly what retail-orientated tactics can be developed and implemented to assist, guide, and improve customers exploring the store and its offerings	
Impact (n)			Themes	Themes
High	Low	No reply	Atmospherics	Store design
15	1	1		
			Staff	Staff
			Sensorial experience	Customer requirements

Findings of Question 15.5a

Data reduction and theme analysis for Question 15.5a were recorded in Appendix E.11 Five categories were identified: merchandising, atmospherics, sensorial experiences, staff, and store layout. The five categories were further reduced to three themes comprising store design, sensorial experiences, and staff.

Most participants (fifteen) acknowledged that enabling customers to freely explore a store and its merchandise within an ergonomically well planned, clearly signed, specified, and structured layout can influence customer experience assessments. This customer requirement impacts not only store design but also emphasises the importance of staff and retail technology that should be made available to promote, aid, and advance customer exploration intentions.

Participants stated that exploring promotes and stimulates impulse buying, enabling choice and customer discretion to ask for assistance when required. They stressed the importance of exploring as it provides a sense of free choice, belonging, at ease, at home, and trust. Exploring can stimulate all customer senses: sight, touch, feel, and physical experience.

Participant responses accentuating the three themes listed in Table 8.15 (store design, sensorial experience, staff) are:

Atmospherics

- Participant 2: “Cluttered, overstocked stores with limited signage result in customers having to search for items, leading to frustration and irritation.”
- Participant 10: “if the layout is open and the colours are calming, an inviting store layout and atmosphere will be more inviting and encourage customers to stay longer.”

Sensorial experiences

- Participant 9: “This makes a difference in that the customer can at least touch and feel which will promote sales and the touch/feel will forever be on the customer’s mind and they will in turn sign up.”
- Participant 14: “I totally feel we must allow customers to wander around the store as they like and promotes impulse purchases. We can control the flow of traffic using signage.”

Staff

- Participant 7: “Sales Agents must be able to answer any possible questions relating to products and services.”
- Participant 15: “Staff should have Full uniform constantly and should be trained on is customer experience. Roles plays during trainings can also boost the agent’s confidence.”

Extant literature validations and discussions related to themes such as store design, sensorial experiences, and staff in preceding sections of this chapter (paragraphs 8.3.3.2, 8.3.3.4, 8.3.3.5) endorsed the importance and validity of each and the role it can play in optimising customer explorations of a retail store.

Findings of Question 15.5b

Question 15.5b was aimed at the retail-orientated tactics that can be developed and implemented to assist, guide, and improve customers exploring the store and its offerings.

Data reduction and theme analysis for Question 15.5b were recorded in Appendix E.12. Six initial themes were identified: displays, store layout, hosting, branding, product, and customer requirements. The six initial themes were further reduced to three themes: store design, staff, and customer requirements.

Participants suggested that retailers should conduct formal and informal research to establish customer exploration expectations and requirements and competitor's tactics in this regard. Store layout tactics should be considered to enable and promote customer exploration intentions. Layouts should optimize the visibility of value propositions displayed through the store's variety of merchandise. Participants submitted that tactics should specifically focus on aspects of shop ease such as walking space, supporting décor, ecstasically presentable floorspace, minimum clutter, and appropriate directional signage.

Merchandising and branding tactics, promoting demonstrations through combining product offerings, displays that enable interaction with a product, transparent pricing, and benefits were some of the additional tactics suggested by participants. Participants also suggested encouraging and empowering staff to support and guide customer exploration actions.

Participants offered the following responses per emerged theme:

Atmospherics

- Participant 8: "Having demos for customers to use, accessories to feel, touch and try. Not too cluttered store, safe and secure environment for them."
- Participant 9: "With the touch and feel - Prices and benefits should always be clearly printed/communicated for the buying cycle to be as short as possible. Share as much as possible without saying much - verbally."

Staff

- Participant 7: "A host to direct customers to their desired products, answer any questions, and provide various options."
- Participant 8: "Having someone to assist the client during that experience and give knowledgeable information required."

Customer requirements

- Participant 1: "Surveys, communicate with customers, analyse competitors' data."

The relevancy, role, and importance of these themes in promoting increased customer experiences, as mentioned in the extant literature, though not precisely the same, but identical in the context of this question, are extensively reported in paragraphs 8.3.3.2, 8.3.3.3 and 8.3.3.5.

8.3.3.9 Findings of Question 15.6a and 15.6b, allowing customers to physically experience store merchandise.

The sixth E-driver, 'Experience', of the management continuum, focuses on enabling customers to experience that physically touch, feel, smell, examine and test retail merchandise. Themes that emerged from the analysis of Questions 15.6a (Appendix E.13), and 15.6b (Appendix E.14) are summarised in Table 8-14.

Table 8-14: Customer experiencing store merchandise

EXPERIENCE - DRIVER				
Question 15.6a			Question 15.6b	
To what extent do you feel that customers having the opportunity to freely experience store merchandise (touch, feel, smell, examine and test retail merchandise) can influence customer experience assessments? Please explain.			Explain briefly which retail-orientated tactics can be developed and implemented to assist and improve customers' physical experience (touch, feel, smell, examine and test retail merchandise) of the store, staff, and store merchandise?	
Impact (n)			Themes	Themes
High	Low	No reply	Decision making	Merchandising
17	0	0		
			Immerged shopping	Atmospherics
			Profitability	Staff

Findings of Question 15.6a

All 17 participants confirmed that the experience-driver can influence customer experience assessments.

Data reduction and theme analysis for Question 15.6a were recorded in Appendix E.13 Three themes were identified: decision-making, immersive shopping and profitability. Participants

suggested that physical experiences of retail merchandise could enhance customers' buying decision-making processes. It provides immersed customer shopping experiences, leading to increased satisfaction, lower purchase returns, and higher sales, resulting in increased profitability.

A significant influence on purchasing decisions resulting in higher sales involves physical touch, play, and a feeling of excitement. Personal connection with a product (hands-on) and provide customers with control, confidence, sense of ownership, confirmation of need fulfilment, immersed and better shopping experience (psychology of control own destiny). Merchandising through live demonstrations, supporting illumination, visible branding (awareness), and visible pricing range (cheap to expensive) are all important factors. Enable the experience opportunities already at the store entrance (at the beginning of the customer authentic journey) and right through the customer journey, as it can result in better customer decision-making, leading to fewer returns and fewer unhappy customers.

Participants offered the following responses per identified theme:

Decision making

- Participant 8: "That can enable customers to make a sound decision in their purchase and also reduce returns and ensure we do not have clients who are not happy with their purchase."
- Participant 11: "Important many customers would like to feel and experience a product before deciding to purchase."

Immersive shopping

- Participant 1: "The product value increases once the person takes ownership of it – the endowment effect. Ownership essentially means control, and if a shopper can control something through touch, they are more likely to feel ownership which in turn increases how much they are willing to pay for a product."
- Participant 13: "I believe a hands-on interaction allows customers to form a personal connection with the products, gain confidence in their purchase decisions, and leads to a more positive and immersive shopping experience, resulting in higher customer satisfaction and favourable assessments."

Profitability

- Participant 8: "That can enable customers to make a sound decision in their purchase and also reduce returns and ensure we do not have clients who are not happy with their purchase."
- Participant 14: "Customers must be allowed to feel and touch products. Will ensure higher % of buying."

The three themes (decision-making, immersive shopping, profitability) that emerged from the analysis are the same in the context of themes that related to earlier questions and are extensively supported by extant literature, refer paragraphs 8.3.3.2, 8.3.3.4, 8.3.3.5. and 8.3.3.7.

Findings of Question 15.6b

Question 15.6b enquired about the retail-orientated tactics that can be developed and implemented to assist and improve customers' physical experience of the store, staff, and store merchandise.

Data reduction and theme analysis for Question 15.6b were recorded in Appendix E.14.

Participants stated that retail tactics to promote physical experiences should include enabling store atmospherics (layout and merchandising). Tactics should also be considered to identify and remove barriers that hinder touching, feeling, smelling, examining, and testing retail merchandise. The application of in-store technology and the availability and support of knowledgeable and interpersonally skilled retail staff also play an important role in enabling customers to experience store merchandise physically.

Participants offered the following responses per identified theme:

Merchandising

- Participant 4: "Ensure that there is a wide variety of only the latest and best offers that will be available for the customer or the examples of the best deals to make the customers know that we are not just selling for their money, but to deliver on their needs (customer needs analysis)."
- Participant 7: "Instore live product demonstration, features and benefits highlighted."

Atmospherics

- Participant 9: “A tablet or station that allows customers to enter/insert the top 6 items they want to have on their devices - then a Top 3 is suggested for them (input - output).”
- Participant 10: “providing a more realistic experience (when it comes to testing out the device), restrictions, for example, the stickers on model devices should be removed.”

Staff

- Participant 8: “knowledgeable agents who understand their product and are able to give sound advice to clients.”
- Participant 17: “have a dedicated trained agent to take the customer through the products. USP, benefits and disadvantages which is very important. We always only focus on advantages and exclude disadvantages. We need to be honest with regards to how the products.”

The three themes (merchandising, atmospherics, staff) are the same in the context of themes related to earlier questions, which are extensively supported by extant literature as quoted in several paragraphs (8.3.3.5, 8.3.3.6, 8.3.3.7, 8.3.3.8)

8.3.3.10 Findings for Questions 15.7a and 15.7b, how retail store staff engage with customers

The seventh e-driver relates to ‘Engage’ in the experience management continuum. Themes that emerged from the analysis of Questions 15.7a (Appendix E.15), and 15.7b (Appendix E.16) are summarised in Table 8-15.

Table 8-15: Customer engagement, impact on customer experience with suggested tactics.

ENGAGE - DRIVER				
Question 15.7a			Question 15.7b	
To what extent do you feel that customers engaging with considerate well trained and knowledgeable store staff during their journey in the retail store can influence customer experience assessments? Please explain.			Explain briefly what retail-orientated tactics can be developed and implemented to promote staff engagements with customers with the aim to improve customers' experience assessments	
Impact (n)			Themes	Themes
High	Low	No reply	Confidence building	Staff
17	0	0		
			Education	
			Expectations	

Findings of Question 15.7a

Data reduction and theme analysis are recorded in Appendix E.15. Three themes were identified from participant responses, customer confidence building, customer education and exploring customer expectations.

Participants all agreed that if customers engage with considerate, well trained, and knowledgeable store staff during retail store journeys it can influence customer experience assessments. They suggest that positive and proactive engagements build staff and customer confidence and provide an opportunity to educate customers and establish and fulfil customer expectations.

The following are some of the participant responses accentuating the themes:

Confidence building

- Participant 1: "Engaging with customers is critical in the sense that the customer can ask questions and the staff can build a rapport with the customer. This makes it easy for the customer to decide."
- Participant 4: "If a customer is browsing this indicates uncertainty, assisting the customer, but not being overbearing or pushy will provide confidence in the customers"

uncertainty regarding the product and the customer would be able to determine from the agent's assistance if this product will fill their needs."

Education

- Participant 3: "The more unspecified features the customer is made aware of, the more the customer will develop interest in the product."

Expectations

- Participant 7: "Engaging with customers is very important as some customers feel intimidated when they get into the store environment. Ask relevant questions as customer walks around the store. Store staff must be knowledgeable on products and services."

The three themes (confidence building, education, and expectations) are a repeat of themes identified in participant responses to earlier questions. Though not identical to earlier themes, the context in which the current three themes were identified is the same and can be borne out by extant literature already stated (refer to paragraphs 8.3.2.4, 8.3.3.2, 8.3.3.3)

Findings of Question 15.7b

Participants identified several tactics retail management can consider to promote proper customer engagement. Data reduction and theme analysis on participant responses resulted in the emergence of one theme, staff (Appendix E.16).

Tactics to be considered to advance customer experience of merchandise include actions to improve staff product knowledge and staff interpersonal/relationship skills. Staff should also be empowered to interact with customers actively. Regular staff-customer engagement assessments can be used to reengineer and improve the customer's physical experience of merchandise. Participants suggested implementing tactics including entailing visible employee of the month awards, specialisation, and investing in staff wellbeing.

Staff

- Participant 1: "Product knowledge, practice active listening, improve technical skills, be solution focused."
- Participant 2: "Employee of the month awards visible in the store."
- Participant 7: "Staff must be trained well, be able to handle any questions without waffling. Explain pros and cons of products. Understanding what customers' needs is."

- Participant 11: “Have well trained specialists on hand to assist customers. Ongoing upskilling and training on new products and services. Recruit correctly.”

Considering the number of times that staff emerged as a theme across all questions it is safe to posit that staff plays a critical role in customers’ experiences. Extant literature already quoted (paragraphs 8.3.3.3, 8.3.3.4, 8.3.3.6, 8.3.3.8) indicated the prominent role that staff play in creating a conducive atmosphere to promote good customer experiences.

8.3.3.11 Findings of Questions 15.8a and 15.8b, staff and customer interactive exchanges

Data analysis and theme extraction for Questions 15.8a and 15.8b deals with the ‘Exchange’- driver of the experience management continuum as reflected in Appendix E.17, and Appendix E.18 and summarised in Table 8-16.

Table 8-16: Customer exchanges, impact on customer experience with suggested tactics.

EXCHANGE - DRIVER				
Question 15.8a			Question 15.8b	
To what extent do you feel that the opportunity to experience open and frank exchanges and interactions relating to the product/service choices with knowledgeable, appreciative, courteous, and interpersonally skilled staff can impact customer experience assessments? Please explain			Explain briefly what retail orientated tactics can be developed and implemented to ensure that retail staff engagements with customers’ support staff, performing the roles of guide, teacher, coach, personal assistant, expert, advisor, consumer advocate, translator, persuader, performer, and transporter with the aim to improve customers’ experiences with retail store staff?	
Impact (n)			Themes	Themes
High	Low	No reply	• Trust	• Staff
16	0	1		
			• Staff	• Atmospherics
			• Atmospherics	

Findings of Question 15.8a

Data reduction and theme extraction are reflected in Appendix E.17. Three themes emerged from the analysis: trust, knowledgeable staff, and store atmospherics, which play an important

role in promoting staff and customer interactions and exchanges that benefit customer experiences.

Sixteen out of seventeen participants agree that the opportunity to experience open and frank exchanges and interactions relating to the product/service choices with knowledgeable, appreciative, courteous, and interpersonally skilled staff, can impact customer experience assessments. The reasons cited by participants related to the impact exchanges and customer interactions can have on cross- and up-selling, matching customer expectations and building customer trust and confidence. Participants regarded knowledgeable staff and store atmospherics as important prerequisites for enabling positive exchanges and interactions.

Participant responses associated with emerged themes are:

Trust

- Participant 7: "Honesty is still the best policy. when staff are open and honest, they build report with customers."
- Participant 8: "That can ensure that the customer is valued, and they are sold a product which the agent is confident about. E.g. Warranty of the product, durability, length of contract, insurance and its importance, packages benefits."

Staff

- Participant 2: "Again, knowledgeable staff is necessary when customers are not sure about which product to choose or what specifications would meet their requirement."
- Participant 13: "Having the opportunity to engage in open and honest conversations with knowledgeable, appreciative, courteous, and interpersonally skilled staff can greatly impact customer experience assessments. When customers feel heard, understood, and valued by sales agents who can provide helpful insights and recommendations, it enhances their overall satisfaction, builds trust in the brand, and leads to positive assessments of their experience."

Atmospherics

- Participant 11: "High - a noisy, cramped store environment can deter customers from purchasing there. Layout of the store can inhibit open discussion."

Validation in the literature for each of these themes can be found in paragraphs 8.3.3.5, 8.3.3.7 and 8.3.3.8.

Findings of Question 15.8b

Data reduction and theme extraction on participants' proposed retail tactics are reflected in Appendix E.18. Two main themes emerged from the analysis: staff empowerment and store atmospherics.

Participants suggested several retail tactics to enable positive customer exchanges and interactions. It should involve store atmospherics, training and interpersonally skilled staff, and promoting a customer-focused ethos. Participants regarded superior product and selling skills as non-negotiables, with the deployment of an information desk and specialists as suggested tactics to enhance customer exchanges and interactions.

Responses from participants giving prominence to the themes include:

Staff

- Participant 4: "I feel weekly documents discussions are needed with your team to ensure they are not falling behind with the latest product changes and to make sure that your team is fully equipped at all times and if not this will be picked up in these discussions mapping a picture for the leader of the team to fill the gaps, a lot of people can't speak in a group and you would get more out of them during these session and they become more personal and not group-oriented."
- Participant 10: "Soft Skills training, practical exercises and testing their skills and knowledge, forming a community of practice where desired behaviour and skills are modelled. The training process, however, should not be rushed and should be implemented thoroughly."

Atmospherics

- Participant 2: "Information desk, staff responsible for specific areas within the store to assist customers."
- Participant 11: "Care should be taken with store design. Fit for purpose furniture and fittings provided."

The themes that emerged for Question 15.8b are supported by extant literature, as reported in paragraphs 8.3.3.5 and 8.3.3.8.

8.3.3.12 Findings of Questions 15.9a and 15.9b, embracing customers

Data analysis and theme extraction for questions 15.9a and 15.9b, which deal with the 'Embrace'-driver of the experience management continuum, are reflected in Appendix E.19 and Appendix E.20 and are summarised in Table 8-17.

Table 8-17: Embracing the customer, impact on customer experience with suggested tactics.

EMBRACE - DRIVER				
Question 15.9a			Question 15.9b	
To what extent do you feel that customers appreciating staff embracing and responding (cognitively and emotionally) to their unique retail requirements, opinions, and recommendations can influence customer experience assessments? Please explain.			Explain briefly what retail-orientated tactics can be developed and implemented to ensure that retail staff fully (cognitively and emotionally) embrace in-store customer behaviour in a manner that would impact positively on customer experience assessments	
Impact (n)			Themes	Themes
High	Low	No reply	• Needs	• Customer focus
15	2	0		
			• Connection	• Staff

Findings of Question 15.9a

Data reduction and theme extraction are reflected in Appendix E.19. Two themes emerged from the analysis: customer needs acknowledgement and emotional connection.

Fifteen participants expressed that customers appreciate staff embracing and responding (cognitively and emotionally) to their unique retail requirements, opinions, and recommendations, which can influence customer experience assessments. Participants stated that in embracing and responding to customers, retail staff acknowledge customer needs and wants, match experience with expectations, and create an emotional connection with customers. It functions as an educational opportunity for staff and customers alike. Staff can learn more about their customers, and customers can discover more about products and services.

The following participant responses supported emerged themes:

Needs

- Participant 2: “In the case of a complaint or return, customers want to feel that they are listened to and understood.”
- Participant 3: “Listening attentively and asking follow-up questions for a clearer understanding of the customer's needs.”

Connection

- Participant 7: “Customers must feel that their needs requests will be totally satisfied. Customer must have that feeling of trust in the staff member.”
- Participant 13: “Customers greatly appreciate when staff embrace and respond to their unique retail requirements, opinions, and recommendations, both cognitively and emotionally. When staff genuinely listen, understand, and cater to individual needs, it creates a personalized and meaningful experience that fosters customer satisfaction, loyalty, and positive assessments of their overall retail experience.”

Extant literature quoted to support these themes can be found in preceding sections, such as paragraphs 8.3.3.4 and 8.3.3.8

Findings of Question 15.9b

Data reduction and theme extraction are reflected in Appendix E.20. Two themes emerged from the analysis, customer focus and staff (empowerment).

Participants suggested that retail management should create opportunities for constructive interactions through strategy and tactics promoting “owning the customer”. Tactics can include focused interpersonal training, staff empowerment and feedback mechanisms and staff briefings to create a continuum of constant improvement. Stores can also consider a suggestion/complaints box for customers or put electronic systems in place where customers can feedback on the level of service received in-store and overall experience on items/products bought.

Participant responses supporting the two themes include:

Customer focus

- Participant 7: “Staff must understand the value the customer is in his environment. Own the customer. Be hospitable towards customers.”

- Participant 10: “Empathizing with the customer's individual needs and situation/ background.”

Staff

- Participant 13: “To ensure positive customer experience assessments, retailers can implement tactics like empathy training, active listening, personalized recommendations, and fostering a supportive work culture, encouraging retail staff to fully embrace and understand in-store customer behaviour.”
- Participant 14: “Welcome store visitors and introduce yourself. Ask the walk-in customer how they are doing. Ask about their needs. Deal with negative response.”

Though not absolutely the same, given the context of these two themes, extant literature validations for the themes can be found in paragraph 8.3.3.7 and 8.3.3.8.

8.3.3.13 Findings of Question 15.10a and 15.10b, execute and conclude a sales transaction

Data analysis and theme extraction for questions 15.10a and 15.10b, are reflected in Appendix E.21, and Appendix E.22 and are summarised in Table 8-18. These questions were aimed at participant opinions regarding the execution phase of an in-store shopping process.

Table 8-18: Execution of sales transactions, impact on customer experience with suggested tactics

EXECUTE - DRIVER				
Question 15.10a			Question 15.10b	
To what extent do you feel that processing a sales transaction in a friendly and efficient manner through effective and adequate point-of-sale technology, and well-trained staff can impact on customer experience assessments? Please explain.			Explain briefly what retail-orientated tactics can be developed and implemented to ensure that retail staff effectively execute and conclude a sales transaction.	
Impact (n)			Themes	Themes
High	Low	No reply	• Execution	• Staff
17	0	0		
			• Customer focus	• Systems & processes
			• Retention	• Management

Findings of Question 15.10a

Data reduction and theme extraction are reflected in Appendix E.21. Three themes emerged from the analysis, effective execution, customer focus and positive returns (retention).

All participants indicated that processing a sales transaction in a friendly and efficient manner through effective and adequate point-of-sale technology, and well-trained staff can impact on customer experience assessments. The impact lies in creating a seamless customer journey and completing a sales transaction that respects and values a customer's patronage. Participants stated that a successful execution can result in a lasting positive customer impression.

The following participant responses are associated with the emerged themes:

Execution

- Participant 2: "Customers' time is valuable, and therefore, they do not want to stand in a queue or wait long before being assisted. Quick, efficient checkout processes are critical to show."
- Participant 11: "Vital - it creates the impression of a well organised and efficient organisation that can be trusted."

Customer focus

- Participant 8: "It ensures that the customer is important, and the customer got value for their money and that we value them as a business."
- Participant 9: "This is important because at that point - the end has to be spectacular - it will stay in the mind of the customer for longer."

Retention

- Participant 13: "When customers experience a smooth and seamless checkout process with friendly interactions and minimal wait times, it leaves a positive impression, enhances customer satisfaction, and contributes to favourable assessments of their overall shopping experience."

Extant literature quoted in paragraphs 8.3.2.3, 8.3.2.4 and 8.3.3.2 are also applicable to the validation of the three themes that emerged from an analysis of responses to Question 15.10a.

Findings for Question 15.10b

Data reduction and theme extraction are reflected in Appendix E.22. Three themes emerged from the analysis, staff, systems and processes, and management.

Participants emphasised the importance of sale executions and, thus, the need for effective and efficient retail transactional systems and processes. It also requires regular sale execution postmortems that should feed into sales, interpersonal and point-of-sale system training. Participants also stressed the need for hands-on, strong retail management of staff, processes, and customer interactions.

The following are some of the participant responses endorsing the emerged themes:

Staff

- Participants 10: “To improve your skills and learn new ones through training - specific skills like how to profile your customer and which terminology to use but also to avoid.”
- Participants 13: “Provide comprehensive training on point-of-sale systems, equipping staff with product knowledge and pricing information.”

Systems and processes

- Participants 11: “Adapt and streamline business processes to eliminate waste and focus on the customer.”
- Participants 13: “Optimizing checkout processes for speed and convenience.”

Management

- Participant 1: “Practical Training & daily supervision.”
- Participants 4: “Managers need to ensure to lead by example, set the bar high, and remain firm, fair, and consistent.”

Extant literature quoted in paragraphs 8.3.2.4 and 8.3.3.5 is also applicable to the validation of the three themes that emerged from an analysis of responses to Question 15.10b.

8.3.3.14 Findings of Questions 15.11a and 15.11b, customers exiting the retail store

Data analysis and theme extraction for questions 15.11a and 15.11b are reflected in Appendix E.23, and Appendix D.24 and are summarised in Table 8-19. These questions were aimed at participants' opinions regarding the exit phase of an in-store shopping process.

Table 8-19: Customer exit store, impact on customer experience with suggested tactics.

EXIT - DRIVER				
Question 15.11a			Question 15.11b	
To what extent do you feel that the customer shop exit process can have a positive impact on a customer's overall shopping experience? Please explain			Explain briefly what retail-orientated tactics can be developed and implemented to ensure that the process of customers exiting the retail store is conducive to a lasting positive customer experience.	
Impact (n)			Themes	Themes
High	Low	No reply	• Retention and referrals	• Training
16	1	0		
				• Processes

Findings of Question 15.11a

Data reduction and theme extraction are reflected in Appendix E.23. Though three categories emerged from the analysis of participant responses (final assessment, relationship, retention) it can be consolidated into one theme, retention, and referrals.

Most participants reported that the customer store exit process can positively impact a customer's overall shopping experience. Participants commented that when customers are provided with a smooth and hassle-free exit process, such as easy access to exits, well-placed signage for guidance, efficient payment and bagging procedures, and friendly farewells from staff, it leaves a lasting impression and contributes to a positive assessment of their shopping experience.

The exit process has the potential to foster relationship building and contribute to final customer assessments. Participants stated that it provides lessons-learned opportunities and can positively influence customer retention, re-patronage, and referrals.

The following participant responses are associated with the emerging theme of retention and referrals:

Retention and referrals

- Participant 1: "This will assess the overall customer experience within your store and identify opportunities to improve retention and engagement."

- Participant 7: “The customer must exit the store knowing that his needs will be met and exceeded. He must be able to send staff more referrals based on his positive experience.”
- Participant 8: “So that the customer can come back to the store or even word of mouth in promoting the business or even the product.”

As with the findings of Question 10a, the literature validation for the retention and referral theme can be found in paragraphs 8.3.2.3, 8.3.2.4 and 8.3.3.2.

Findings for Question 15.11b

Data reduction and theme extraction are reflected in Appendix E.24. Two main themes emerged from analysing participant responses, training, and processes.

Given the importance of a retail customer exit strategy, participants suggested specific exit tactics that provide staff training updates resulting from lessons learned sessions such as start-up meetings and role-play sessions. Retailers are advised to investigate and consider the implementation of specific trademark exit rituals supported by appropriate exit store atmospherics.

The following are some of the participant responses supporting the emerged themes:

Staff

- Participant 4: “Regular role play during morning meeting assisting agents to remember the basics and not falling into habits of slacking due to pressure and surrounding.”
- Participant 7: “Ask the customer if his requests /needs will be met. Give the customer your details (i.e., email address should he have any future questions). Give customer timelines. Under-promise and over-deliver.”
- Participant 11: “Train staff to greet customers by name, to thank them at the end of the transaction, to provide them with after sales contacts etc.”

Processes

- Participant 10: “Exit interviews conducted in a fun and creative manner, especially for new customers or elderly customers who have never used smartphones and are now purchasing a smart device.”

- Participants 13: “To create a lasting positive customer experience during the exit process, retailers can implement retail-oriented tactics such as clear exit signage, efficient checkout procedures, friendly farewells from staff, and helpful amenities like bagging assistance. These tactics ensure a smooth and pleasant departure, leaving customers with a positive final impression of the retail store.”

Extant literature validation for staff and processes can be found in previous sections including paragraphs 8.3.2.4 and 8.3.3.5.

8.3.3.15 Findings of Questions 15.12a and 15.12b, enhancing key drivers of customer experience

Data analysis and theme extraction for questions 15.12a and 15.12b, are reflected in Appendix E.25, and Appendix E.26 and are summarised in Table 8-20. These questions were aimed at participant opinions regarding the enhancement, that is, constantly updating the content, context, and tactics, of the twelve key drivers of customer experience management continuum.

Table 8-20: Enhancing key drivers, impact on customer experience with suggested tactics

ENHANCE - DRIVER				
Question 15.12a			Question 15.12b	
To what extent do you feel that retail entities sourcing and eliciting experience feedback from customers and then implementing changes accordingly can impact on future customer experience assessments? Please explain.			Explain briefly what retail-orientated tactics can be developed and implemented to ensure an effective process of obtaining, considering, developing, and implementing customer experience feedback to enable fine-tuning or adapting the key drivers towards improved customer experiences.	
Impact (n)			Themes	Themes
High	Low	No reply	• Improvement	• Feedback mechanisms
15	1	1		
			• Sustainability	• Customer orientation

Findings for Question 15.12a

Data reduction and theme extraction are reflected in Appendix E.25. Two main themes emerged from the analysis of participant responses that illustrated the importance of continuous enhancements, improvement, and sustainability.

Fifteen out of seventeen participants indicated that retail entities sourcing and eliciting customer experience feedback and implementing changes could impact future customer experience assessments. Only one participant stated a low impact.

Participants suggested that the impact of enhancements lies in the value of feedback learnings leading to updating and improving tactics to remain relevant and competitive and grow the business. It also shows that customers' feedback, opinions, and suggestions matter to retail management.

Participants also state that eliciting customer experience feedback and then implementing enhancement changes accordingly by providing specific retail staff training, exit atmospherics, and after-sales process opportunities. They suggest that customer feedback can enable the development and training of exit rituals, leading to a competitive advantage. Retail management, through a focus on customer feedback, will also have the option to develop and implement customer feedback mechanisms that suit their retail market segments.

The following participant responses are associated with the emerged themes:

Improvement

- Participant 1: "It will influence improved future experiences because these would have been learnings from previous customer feedback."
- Participant 10: "Largely because the customer's feedback today will improve our customer service tomorrow."
- Participant 14: "To all extent - customer feedback will tell us where to improve and where we were good, we can tell other potential customers."

Sustainability

- Participant 3: "We need to strive for positive feedback, for word-of-mouth can make or break the business."
- Participant 17: "With the ever-changing trends and technologies, enables the business to be relevant up to breast with new trends."

Validation from extant literature can be found in previous sections and in particular paragraphs 8.3.2, 8.3.2, 8.3.2.4 and 8.3.3.2.

Findings for Question 15.12b

Data reduction and theme extraction on participants' suggested retail tactics are reflected in Appendix E.26. Two main themes emerged from the analysis of participant responses: feedback mechanisms and customer orientation.

In suggesting appropriate retail tactics regarding enhancements, participants emphasised the importance of a clear customer experience vision. The vision should be supported by a competent, well-trained retail team empowered by proper and effective retail processes and systems.

Feeding into the vision should include various customer feedback mechanisms (NPS, VOC, customer reviews, surveys, and in-store suggestion boxes). Feedback obtained should be analysed, and enhancements to the retail entity's customer orientation and customer service training should be an everyday occurrence to ensure business sustainability.

The following participant responses are associated with the emerged themes:

Feedback mechanisms

- Participant 4: "Managers of stores should treat the feedback received from NPS as very critical, this affects sales and possibly negative word of mouth from that customer to others, domino effect if not treated as a critical area."
- Participant 13: "Retailers can ensure an effective process of obtaining, considering, and implementing customer experience feedback by using surveys, actively listening to suggestions, analysing data, and making necessary changes to enhance customer experiences. This enables fine-tuning and adaptation of key drivers towards improved customer satisfaction."

Customer orientation

- Participant 1: "Understand your audience, define a clear customer experience vision, build a strong team to increase customer experience. Invest in the right system and tools to level up customer experience."
- Participant 16: "Customer orientation is a business approach in which an organisation solves for the customer first. It's all about focusing on helping customers meet their goals. Essentially, the needs and wants of the customer are valued over the needs of the business. For customer service, this means your support team is focused on meeting customer needs."

Literature validation for the themes can be found in paragraphs 8.3.2.1, 8.3.2.4, 8.3.3.4 and 8.3.3.8.

The 12Es of the customer-centric experience management framework represents a management continuum. The final step, 'Enhance', representing the 12th E-driver of a customer's journey through an in-store retail store, leads directly into the 1st E- driver 'Expect' as the next step in the experience management continuum. The 12E management continuum encourages a self-renewable retail management approach aimed at retail sustainability through customer experience.

The emerging themes of all questions applicable to Section C (Questions 15.1 to 15.12) are summarised in the next section.

8.3.3.16 Summary of themes emerging from Section C, Questions 15.1 to 15.12

Seventeen participants each responded to twenty-four questions related to the impact of each of the 12E constructs on customer experience. These responses also included suggestions for retail tactics that should be considered in promoting increased customer experience in retail stores.

Data reduction and theme analysis, as reflected in Appendix E.27, were performed on 390 responses, identifying 120 categories across all 24 questions. The 120 categories were further analysed, and 58 themes emerged. The 58 themes are summarised in Table 8-21.

Table 8-21: Summary of themes emerging from Section C, Questions 15.1 to 15.12.

Emerged themes	Emerged themes
Question 15.1a • Profiling • Journey Question 15.1b • Needs • Staff	Question 15.2a • Trust • Merchandising • Atmospherics Question 15.2b • Staff • Atmospherics • Merchandising
Question 15.3a • Value perceptions • Staff Question 15.3b • Staff	Question 15.4a • Tone setting • Staff Question 15.4b • Staff

Emerged themes	Emerged themes
• Social media • Atmospherics	• Technology • Entrance atmospherics
Question 15.5a • Atmospherics • Sensorial • Staff Question 15.5b • Atmospherics • Staff • Customer requirements	Question 15.6a • Decision making • Immersed shopping • Profitability Question 15.6b • Merchandising • Atmospherics • Staff
Question 15.7a • Confidence building • Education • Expectations Question 15.7b • Staff	Question 15.8a • Trust • Staff • Atmospherics Question 15.8b • Staff • Atmospherics
Question 15.9a • Needs • Connection Question 15.9b • Customer focus • Staff	Question 15.10a • Execution • Customer focus • Retention Question 15.10b • Staff • Systems and processes • Management
Question 15.11a • Retention and referrals Question 15.11b • Staff • Processes	Question 15.12a • Improvement • Sustainability Question 15.12b • Feedback • Customer focus

The 52 themes for Question 15.1 to 15.12 (Table 8-21) were further analysed for consolidation purposes. The result of the analysis is reflected in Table 8-22 that shows the consolidated themes applicable to the impact and tactics associated with the 12Es.

Table 8-22: Consolidated themes that emerged for Questions 15.1 to 15.12

Impact of 12Es on customer experience (responses)				Consolidated themes for impact and suggested retail tactics
High	Low	No reply	Total responses	• Vision and strategy • Staff • Information management • Atmospherics and merchandising • Systems, processes, and technology
194	5	5	204	

Responses related to Section C, Questions 15.1 to 15.12 dealt with the impact (the ‘why’) of each of the 12E drivers, its applicability, validity, and efficacy. It also suggested pragmatic retail store tactics that could be considered to stage, support and manage the twelve key drivers of the study’s conceptual experience management framework.

Retail management and training participants overwhelmingly indicated that each of the 12Es greatly impacts customer experience (Tables 8-9 to 8-20). A summary of participant responses (Table 8-22) showed that the majority (194) of the detailed responses signified that the 12Es greatly impact customer experience. A few responses (5) indicated a low impact on customer experience, while another five indicated no opinion.

Through data reduction and several layers of theme analysis (Appendix E.27), five consolidated themes were identified (Table 8-22):

- Vision and strategy
- Staff
- Information management
- Atmospherics and merchandising
- Systems, processes, and technology

These themes represent a consolidated view of the impact of the 12Es on customer experience and retail management and trainers’ suggested retail tactics to support the execution of each of 12Es. The five themes directly and indirectly, reverberated repeatedly in the participants responses across all 12Es and can be regarded as crucial drivers for the implementation, advancement, and management of the 12E customer experience management framework.

The recurring thematic content of Table 8-21 and the consolidated five themes confirms and expands on earlier research conducted by Terblanche (2018:50). The recurring themes that emerged from that research include merchandise on offer, atmospheric layout (“wide aisles that contribute to easy in-store movements, and eye-catching displays that expose customers to all the merchandise. The layout enhances time-saving and efficient self-service and checkout”), competent and friendly staff, quality of products and interaction and “communication with other customers during which experiences and suggestions are shared” (Terblanche, 2018:50).

The findings of the current study emphasised the importance of retail staff. The ‘staff’ theme emerged the most (15 times) from Questions 15.1 to 15.12 analyses. The importance of retail staff is also extensively borne out by extant literature:

The role of retail staff is accentuated by Beatty *et al.* (1996:235) who note that the importance of patience, self-respect, and respect for other individuals, emphasizing the importance of being honest with customers and being truly concerned about what is best for them. Yim *et al.* (2008:743) refer to passion and define people’s affectionate bonds with other people, objects, or brands as a multifaceted construct in which intimacy (connectedness) and passion are its core elements. Such works provide insights into the role of commitment in customer–firm relationships, indicating that it mediates satisfaction and future intentions.

Terblanche (2018:51), in studying specialty shop customers, comments that staff assistance is deemed the second most important factor when customers rated their satisfaction with the shop’s environmental stimuli. In summarising his findings, Terblanche states that positive customer emotions can be the outcome of courteous and knowledgeable staff, whilst personal attention and prompt service by staff can further contribute to pleasant in-store customer shopping experiences and customer satisfaction (Terblanche, 2018:51). These findings are supported by Alexander and Kent (2022:9), who emphasized that improving staff training and knowledge can alleviate human frictions encountered in some areas of retail.

The next section reports on the findings of Section D of the qualitative study that deals with participant responses regarding the structural and causal relationship between the study’s conceptual management framework’s measured variables, latent constructs and consequence constructs.

8.3.4 Section D: Impact of good and satisfying customer experiences.

Section D questions focused on the views and opinions of study participants on the effect of customers having pleasant and fruitful (or not) customer retail experiences. It focused on the influence customer experience exerts on other customer centric performance metrics.

Section D investigated the causal relationship between customer experience and three other customer centric performance constructs: customer satisfaction, customer engagement and customer re-patronage (Questions 15.13 to 15.15). These three constructs function as consequence constructs of customer experience. Section D also obtained the views of participants on the causal relationship between customer satisfaction and customer engagement, as mediators, and customer re-patronage (Questions 15.16 and 15.17).

The categories and themes resulting from data analyses, reflected in the study's Appendix section, are indicated for each question of Section D. The emerging themes per question were summarised and then subjected to further theme consolidation to be reflected at the end of this section. Support for emerging themes from extant literature will be provided at the end of this section, supporting the consolidated themes for Section D.

8.3.4.1 Findings of Question 15.13: “To what extent do you feel that a good, bad, or indifferent customer experience can impact customer satisfaction level? Please explain.”

Data analysis and theme extraction are illustrated in Appendix F.1. The findings of Question 15.13 are summarised in Table 8-23.

Table 8-23: Themes for Question 15.13 responses

Impact			Themes
High	Low	No reply	• Retention
17	0	0	• Referral
			• Staff treatment

All participants indicated that a good, bad, or indifferent customer experience can impact customer satisfaction levels. The impact of a customer's experience on customer satisfaction manifests in customer retentions, referrals and the treatment of staff by customers. The following participant responses per the emerged theme were recorded:

Retention

- Participant 1: “A huge extend because this is a deciding factor for the customer to come back or refer others.”
- Participant 16: “Good customer experience will be able to keep our customers.”

Referrals

- Participant :11: “Customers may not complain but they will influence others in some way or the other - word of mouth - if a potential customer hears of bad experiences, they may be hesitant to do business.”
- Participant 15: “Great customer service result in word of mouth – referrals.”

Staff treatment

- Participant 4: “It will impact the way in which the customer engages with the agent customer will not be open to discussion and will just want to get out of the store as soon as possible.”

8.3.4.2 Findings of Question 15.14: “To what extent do you feel that a good, bad, or indifferent customer experience can impact customer engagement level? Please explain.”

Data reduction and theme extraction are reported in Appendix F.2. Three themes emerged: retention, referral, and staff motivation, as indicated in Table 8-24

Table 8-24: Themes for Question 15.14 responses

Impact			Themes
High	Low	No reply	• Retention
16	0	1	• Referral
			• Staff motivation

The majority of participants, sixteen indicated that a good, bad, or indifferent customer experience can impact customer engagement levels. Participants reported that

positive referrals, interactions, need satisfaction, engagement, can lead to an increase in retail profits. Customer disengagement, reduced enthusiasm, lack of interaction or involvement, bad reviews and losing customers can lead to lower profits.

The following participant responses per the emerged theme were recorded:

Retention

- Participant 8: “Good customer experience ensures more customers coming back or even telling others about your business, bad customer experience does the opposite.”
- Participant 11: “Good customer experience will have a positive impact in that it enhances loyalty, where a bad experience may cause a customer to walk away.”
- Participant 13: “I believe that a good, bad, or indifferent customer experience can strongly impact the level of customer engagement. A good experience can foster a deeper connection, increased loyalty, and active participation with a brand, while a bad or indifferent experience can lead to disengagement, reduced enthusiasm, and a lack of ongoing interaction or involvement.”

Referral

- Participant 2: “Happy customers will recommend; unhappy customers will leave and will tell others of their experience.”
- Participant 3: “The customer will always share the service received with others, whether good or bad.”

Staff motivation

- Participant 4: “A customer that is having a bad experience will make reflect this on the agent assisting them possibly leading to an irate situation, but a customer that is having a good experience will reflect this in their interaction with the agent, the customer will then be more open to suggestions, options and sorting out a query.”

8.3.4.3 Findings of Question 15.15: “To what extent do you feel that customer experiences have a direct effect on customer retention and customer re-patronage behaviour? Please explain.”

Data reduction and theme extraction are reported in Appendix F.3. Three themes emerged: retention, referral, and business continuation, as indicated in Table 8-25.

Table 8-25: Themes for Question 15.15 responses

Impact			Themes
High	Low	No reply	• Retention
16	0	1	• Referral
			• Business continuation

A majority of sixteen participants indicated that customer experiences directly affect customer retention and re-patronage behaviour. This is evident in referrals, business continuation, customer churn, merchandise returns, loyalty, and sale cancellations.

The following participant responses per the emerged theme were recorded:

Retention

- Participant 1: “This has a huge impact because the customer will always go back to where they were treated best.
- Participant 11: “It impacts highly - if a customer is satisfied and engaged, they will be less likely to be enticed away by similar offerings from a competitor.”

Referral

- Participant 2: “Happy customers will recommend; unhappy customers will leave and will tell others of their experience.”
- Participant 3: “Potential customers may increase or decline as a result of word of mouth.”

Business continuation

- Participant 7: “Hence more sales from customers who don't need much convincing.”
- Participant 13: “When customers are satisfied with their experience, they are more likely to become loyal, repeat patrons, while dissatisfaction can lead to decreased re-patronage and potential loss *of business*.”

8.3.4.4 Findings of Question 15.16: “To what extent do you feel that customer satisfaction has a direct effect on customer re-patronage behaviour? Please explain.”

Data reduction and theme extraction are reported in Appendix F.4. Three themes emerged, retention, business continuation and referral as indicated in Table 8-26.

Table 8-26: Themes for Question 15.16 responses

Impact			Themes
High	Low	No reply	• Retention
15	0	2	• Business continuation
			• Referral

A total of fifteen participants agreed that customer satisfaction has a direct effect on customer re-patronage behaviour. Participants stated that the effect on customer re-patronage can be seen from customer retention tendencies and customer referral actions. The following participant responses per the emerged theme were recorded:

Retention

- Participant 4: “If the customer leaves the store happy and satisfied, the customer will return to your store knowing they had a good experience and got what they went to the store for.”
- Participant 8: “Increase in customers and happy customers always come back or even go to the extent of promoting your business without you being aware.”

Business continuation

- Participant 7: “Hence more sales from customers who don't need much convincing.”
- Participant 13: “When customers are satisfied with their experience, they are more likely to become loyal, repeat patrons, while dissatisfaction can lead to decreased re-patronage and potential loss of business.”

Referral

- Participant 2: “Happy customers will recommend; unhappy customers will leave and will tell others of their experience.”

- Participant 7: "A satisfied customer will be your spokesman to friends and family. Hence more sales from customers who don't need much convincing."

8.3.4.5 Findings of Question 15.17: "To what extent do you feel that customer engagement has a direct effect on customer re-patronage behaviour? Please explain."

Data reduction and theme extraction are reported in Appendix F.5. Two themes emerged, retention and referral as indicated in Table 8-27.

Table 8-27: Themes for Question 15.17 responses

Impact			Themes
High	Low	No reply	• Retention
16	0	1	• Referral

Most participants indicated that customer engagement directly affects customer re-patronage behaviour as it impacts customer trust, loyalty, emotional connection, referrals, retentions, and customer base growth and confirms initial customer decisions about purchases at a store.

The following participant responses per the emerged theme were recorded:

Retention

- Participant 13: "When customers are actively engaged with a brand, they develop a stronger connection, are more likely to become loyal, repeat patrons, and actively seek out future interactions and experiences."
- Participant 14: "Huge extend - the more engagement, the more retention and up-selling leads to a stable customer base."

Referrals

- Participant 4: "If a customer has a bad experience they will not return to the store, and there is the possibility of them discussing the bad experience with family or friends, having a negative effect on your foot count numbers."

- Participant 7: “When customers have that positive engagement with staff, they will trust and appreciate the openness. This situation will build loyalty and bring in more customer requests.”

8.3.4.6 Consolidated themes for Section D

Section D of the qualitative questionnaire requested participants to share their opinions on the impact that customer experience has on customer satisfaction, customer engagement and the willingness of customers to re-patronage (revisit) retail entities. It also enquired from participants about the impact of customer experience through mediators such as customer satisfaction and engagement on customer re-patronage.

Further analyses (Appendix F.6) were applied to the 14 themes that emerged from Questions 15.13 to 15.17, as reflected in Tables 8-23 to 8-27. From these analyses, the emerging themes were consolidated into four themes, as contained in Table 8-28.

Table 8-28: Consolidated themes that emerged for Section D

Impact				Consolidated themes
High	Low	No reply	Total responses	
80	0	5	85	
				• Retention • Referrals • Business continuation • Staff motivation

Impact of customer experience

A summary of participant responses (Table 8-28) across the five questions of Section D showed that more than 80 out of a possible 85 detailed responses indicated that customer experience directly impacts customer satisfaction, re-patronage and engagement and that customer experience also has an effect on re-patronage through mediators such as customer satisfaction and engagement. Only five responses indicated no opinion.

Extant literature on the impact of customer experience

Exploratory research conducted by Pozza (2014:133) shows that "customer experiences of sense, feel, act, think and relate, as identified by Brakus *et al.* (2009), are important elements in the process of customer satisfaction formation. Babin and Darden (1996:205) support this finding by stating that mood influences spending and substantially impacts customers' perceptions of satisfaction with a retailer.

Pei *et al.* (2020:15) state that it is evident “that customer experience is an important source of sustainable competitive advantage for retailers through the differentiation strategy

Therefore, in physical stores or online shopping, to improve customer satisfaction, it is more effective for physical store retailers to invest in enhancing product experience and experience with the shopping environment.”

Studies by Mohd-Ramly and Omar (2017:1150) confirm that “customer experience was significantly and positively related to customer engagement”. The researchers found that the results of their study “demonstrate a significant positive relationship between customer experience and customer engagement. Prior studies (Bowden, 2009; Vivek *et al.*, 2012) have stressed the importance of customer interactive experience as a value determinant for engagement. The finding of this study confirmed the association of both constructs as indicated by prior literature (Bennett, 2013; Hayes & MacLeod, 2007; Shernoff & Vandell, 2007)” (Mohd-Ramly & Omar, 2017:1151).

In referring to environmental cues (that play an important role in customer experience) Baker *et al.* (2002:120) draw attention to the influence thereof on “patronage intentions”. Bloemer and Kasper (1995:315) refer to the term “manifest satisfaction” and declare that it “is directly and unequivocally related to true brand loyalty because manifest satisfaction means the explicit evaluation of the brand which (in the case of a positive evaluation) leads to commitment to the brand”. Baker *et al.* (2002:129) in referring to several previous studies posit that a direct link between service quality (that also affect customer experience) and “patronage intentions” exist.

Research among 496 hotel and airline customers suggests that customer engagement enhances customers’ service brand evaluation, brand trust, and brand loyalty. The results show that service brand loyalty can be strengthened through the service consumption experience and customer engagement beyond the service encounter (So *et al.*, 2016:64).

Customer reviews following good customer experiences can also positively influence buying decisions and enable retailers to differentiate themselves from competitors (Patil & Rane, 2023:3442). Kriss (2014) states that customer experience drives sales and increases the retail customer base, both having the potential to increase retail profits.

Extent literature on consolidated themes for Section D

In considering the responses from the preceding Section C, where participants indicated the validity and efficacy of the 12Es on customer experience, the four consolidated themes of Section D (Table 8-28) confirmed the structural and causal relationship between the study's

conceptual management framework's latent & consequence constructs. This relationship and the impact of good and satisfying customer experiences on customer satisfaction, engagement, and re-patronage, as reflected by the four consolidated themes (retention, referrals, business continuation, staff motivation), are supported by extant literature.

Academic literature quoted to show the impact of customer experience also validates the outcomes of customer experience as reflected in the four consolidated themes. Further support can be found in a study by Akbar and Parvez (2009:34) that states that "customer satisfaction performs an important mediating role between service quality and customer loyalty". The researchers state that customers must be led to believe the company will not behave opportunistically for its own interest; otherwise, they will switch their allegiance".

Several studies refer to the causal relationship between the study's latent and consequence constructs and the value associated with these relationships. Alshurideh *et al.* (2012:75) indicate that customer satisfaction directly affects customer retention and leads customers to make repeat purchases. Kriss (2014) notes that "it is possible to quantify the impact of customer experience and that customer experience is a major driver of future revenue. It is further reported that "after controlling for other factors that drive repeat purchases in the transaction-based business (for example, how often the customer needs the type of goods and services that the company sells), customers who had the best past experiences spend 140% more compared to those who had the poorest past experience" (Kriss, 2014).

Ibojo and Asabi (2015:59) support these findings and posit that the degree of profit maximisation depends on the level of customer satisfaction which directly links with customer loyalty. Customer loyalty is one of the most important indicators of good performing organisations.

LaFleur (2023) identifies seven benefits associated with customer experience management including reduced customer churn, higher customer retention and increased ROI, better customer engagement, reduced cost of services and marketing, improved crises management ("protection from public outrage or humiliation"), higher customer lifetime value and increased brand equity.

The following section consolidates the findings of Sections B, C, and D into a roadmap of essential success factors derived from the section's consolidated themes and supported by tactics for implementation and benefits associated with successful implementation.

8.4 CRITICAL SUCCESS FACTOR ROADMAP WITH SUPPORTING TACTICS AND BENEFITS

The core of the qualitative study can be found in the findings related to Section B (Questions 11 and 12), Section C (Questions 15.1 to 15.12) and Section D (Questions 15.13 to 15.17).

The core findings were used to migrate to what resembles “a visual model called axial coding paradigm” (Cresswell, 2007:64). This entails data coding in categories of information, the identification of core phenomenon, the creation of categories around core phenomenon and selective coding (Vollstedt & Rezat, 2019:89) “in which the researcher takes the model and develops propositions (or hypotheses) that interrelate the categories in the model or assembles a story that describes the interrelationship of categories in the model” (Cresswell, 2007:64).

This process was used as a guideline to interrelate consolidated themes in Sections B, C and D (study’s core findings) to provide a visual model (or story) of qualitative study findings. The diagram depicted the central phenomenon, customer experience management framework, causal conditions, context, intervening conditions, strategies, and consequences.

As a review, the applicable themes per section that constitutes the visual diagram were:

Section B (Questions 11 and 12)

The study’s problem statement revolves around the perceived mismatch between customer expectations and in-store retail service experience. Retail management and training participants overwhelmingly acknowledged the existence of such a mismatch in the South African retail industry. In consolidating the themes, one theme emerged: retail leadership (Table 8-6).

Section C (Questions 15.1 to 15.12)

Five consolidated themes (Table 8-22) characterised the impact of the 12Es on customer experience and retail management and trainers’ suggested retail tactics to support the execution of each of 12Es. These themes include customer experience vision and strategy, retail staff, retail information management, retail store atmospherics and merchandising, retail systems, processes, and technology applications.

Section D (Questions 15.13 to 15.17)

Four consolidated themes of Section D (Table 8-28) embodied the impact effects of the structural and causal relationship between the study’s conceptual 12E management framework, customer experience and its three consequence constructs (customer satisfaction, customer

engagement, customer re-patronage). The consolidated themes are retention, referral, business continuation and staff motivation.

Table 8-29 summarises the consolidated themes extracted from the study's three sections, representing the core findings of the qualitative study.

Table 8-29: Consolidated themes per Qualitative Study Section

Section B	Section C	Section D
Consolidated theme	Consolidated themes	Consolidated themes
• Leadership	• Vision and strategy • Staff • Information management • Atmospherics and merchandising • Systems, processes, and technology	• Retention • Referral • Business continuation • Staff motivation

The study proposes that Section B and Section C themes, consisting of retail leadership, customer experience vision and strategy, retail staff, retail information management, retail store atmospherics and retail systems, processes and technology applications, are regarded as the six key drivers for the implementation of the conceptual 12E management framework.

The qualitative data reduction and thematic analysis followed to determine the six key drivers represented. Ram and Corkindale (2014:152) define them as a systematic way of identifying the key areas, or signposts, that require management's constant and careful attention to achieve performance goals. It is posited that the six key drivers constitute what literature defines as critical success factors.

Critical success factors (CSF) are defined by Rockart (1978:12) as the limited number of areas in which results if they are satisfactory, will ensure competitive performance for the organisation. Bullen and Rockart (1981:7) support this notion by declaring that these are the few key areas where "things must go right" for the business to flourish and for the manager's goals to be attained.

As CSF for the 12Es, the six consolidating themes should be supported by an array of tactics (Tables 8-6 and 8-22) for it to be pursued successfully. These tactics should assist retail management in improving customer experiences and achieving the desired performance outcomes. A visual presentation of the six CSF themes, each surrounded by retail tactics to be

pursued to execute the CSF, is depicted in Figure 8-2. The visual presentation provides a framework for, aids and strengthens the systematic implementation of the conceptual 12E management model.

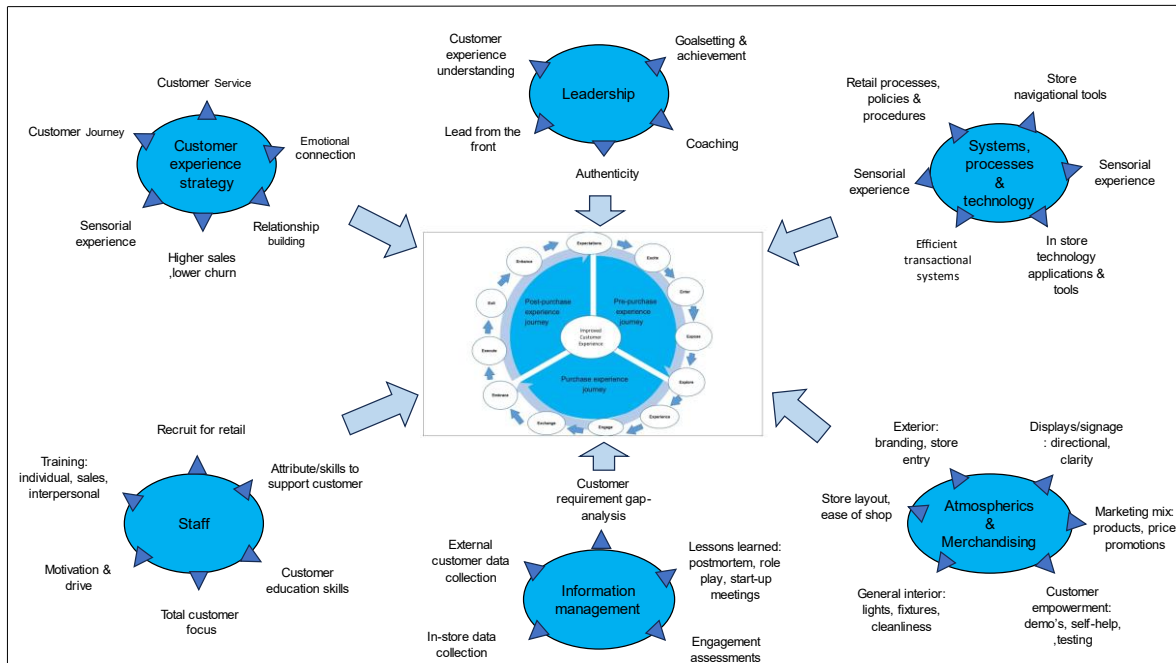


Figure 8-2: Critical success factor roadmap with supporting tactics

Figure 8.2 represents “the storyline of the research” (Vollstedt & Rezat, 2019:89). It depicts the detection of a path that “leads the way through all the trees so that the wood can finally be seen” (Vollstedt cited by Vollstedt & Rezat, 2019:89).

The results of a successful implementation of the CSF framework reside in the four consolidated themes of Section D (Table 8-28) customer retention, customer referrals, business continuation and retail staff motivation. These themes confirmed the structural and causal relationship between the 12Es customer experience and its three related constructs and revealed four consequences of implementing the experience management framework. Updating the CSF roadmap to reflect the four consequences (potential effect) is depicted in Table 8-30.

Table 8-30: Implementation of experience management framework

Path to implementation of customer experience management framework		
Critical success factor	Tactical focus areas	Potential effect
Leadership	- Clear understanding of customer experience - Goalsetting and achievement (measurements)	- Customer retention - Retail staff motivation - Customer referrals

Path to implementation of customer experience management framework		
Critical success factor	Tactical focus areas	Potential effect
	• Coaching • Authenticity in leadership • Lead from front	• Business continuation (growth and profits)
Strategy	• Customer service • Create emotional connection • Relationship building • Higher sales lower churn • Sensorial experiences • Customer journey	
Staff	• Recruit for retail • Attributes to support customers • Skills to educate customers • Totally customer focused • Motivation and drive • Training for sales and interpersonal skills	
Information management	• Customer requirement gap analysis • Information gathering - lessons learned, role play, start-up meetings • Engagement assessments • In-store data collection • External data collection	
Atmospherics and merchandising	• Exterior branding, attention to store entry • Displays/clear directional signage • Marketing mix: product, price, promotions • Customer empowerment through demonstrations, self-help, testing, experiencing • General interior, lights, fixtures, cleanliness • Store layout – ease of shop	
Systems, processes, and technology	• Supporting retail policies and procedures • Store navigational tools • Enable sensorial experiences • In-store technology applications and user-friendly tools	

Path to implementation of customer experience management framework		
Critical success factor	Tactical focus areas	Potential effect
	- Efficient transactional systems - Enable sensorial experiences	

The contents of Table 8-30 are visually depicted in Figure 8-3.

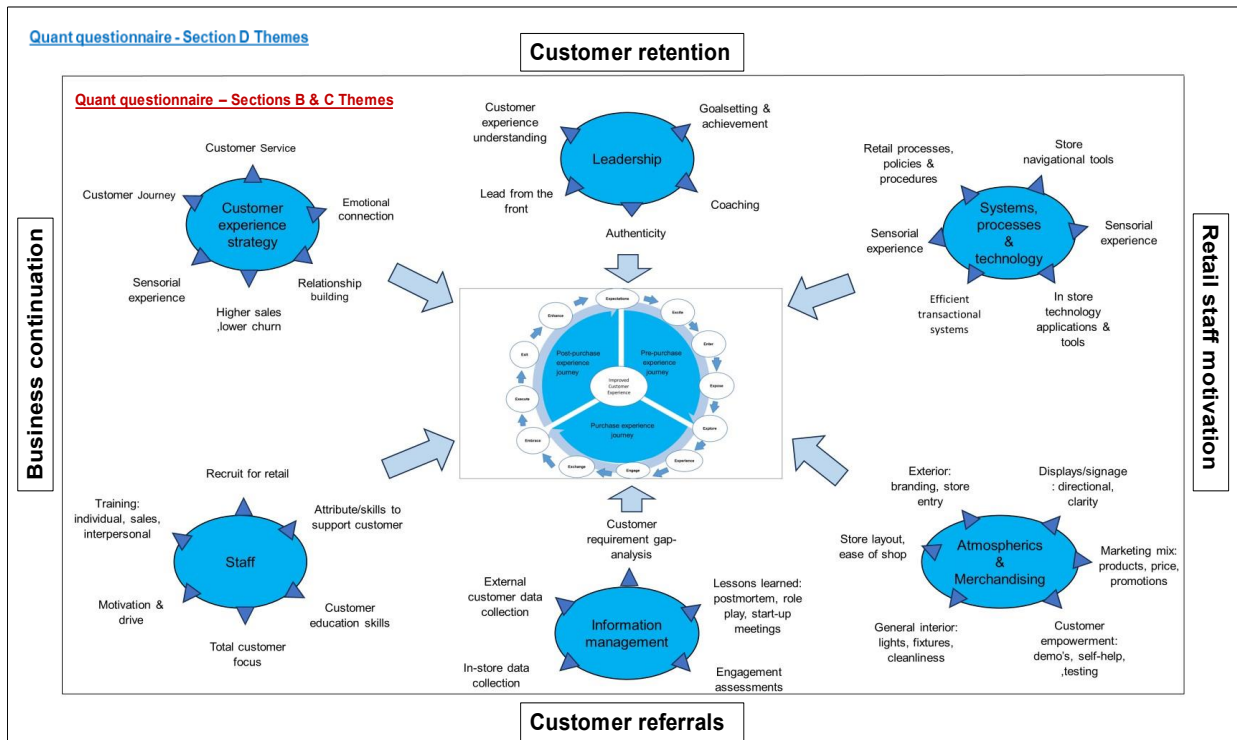


Figure 8-3: Critical success factor roadmap with customer experience impact benefits

8.5 CHAPTER SUMMARY

The qualitative study consisted of four sections. Section A provided a demographic overview of the seventeen participants. Participants were employed in the South African Communication Sector, operating as Communication Service Providers (CSP) through owned and operated retail store networks. They represented all levels of retail management, including senior management, middle management, junior management, and training specialists responsible for customer experience training. Ten participants were between one and three years in their current occupations, each with more than ten years of retail experience with other retailers before joining their company. Two participants had five to ten years of experience, and five participants had more than ten years of experience in their current companies. More than half

of the participants manage at least five stores. Most participants had post-matric qualifications and were mostly situated in the Gauteng Province.

Section B dealt with the customer measurement and management models to which participants were exposed in their current occupations. The majority of participant companies utilised customer experience and customer loyalty models measuring various retail-orientated key performance indicators (KPI's) with a bias towards Customer Journey Net Promotor Score KPI's. Eleven participants regarded their companies' customer experience performance as good and highlighted management motivation, sales staff performance, ease of shop, staff training and product quality. Customer experience management information, store atmospheric and logistical and marketing support were mentioned as challenges.

Though positive towards their own company's performance, twelve out of seventeen participants regarded the customer experience performance of the South African retail industry as poor. Participants cited consistency, service and product quality, staff motivation, commitment, and accountability as the most critical problem areas. References were also made to poor customer communication, customer experience, and customer service tactic implementation. Most participants ascribed a mismatch between customer expectations and the level of service experienced at retail stores as the reason for poor performances. Staff attitude and training, retail management's CE understanding, staff support, staff motivation, lack of customer education, and an overly high emphasis on profits were identified as root causes of the mismatch.

Study participants regarded authentic relationships with customers through all interactional phases, and meeting customer expectations as synonymous of customer experience and a prerequisite for sustained profits. Participants indicated that the drivers for achieving this lie with staff's hard and soft skills, retail atmospherics and business processes, and analyses of customer expectations followed by a customer experience strategy supported by appropriate tactics.

The core of the study was in Section C, where participant responses were obtained on the impact (the "why") of each of the 12E constructs and their applicability, validity, and efficacy for the retail industry. Participants were also invited to suggest pragmatic retail store tactics that could be considered to stage, support and manage the twelve key drivers (12Es) of the experience management framework. An analysis of Sections B and C enabled the researcher to consolidate the results into a Critical Success Factor Roadmap with supporting tactics that could aid, support, and strengthen the implementation of the customer-centric experience management framework for the South African retail industry.

Section D elicit participant responses on the impact of good and satisfying customer experiences. Emerging themes from each of the five questions were clustered into four consolidated themes, indicating the positive outcomes should retail companies succeed in promoting higher levels of customer experience. The positive outcomes comprised customer retention, customer referrals, business continuation (retail company growth and increased profits), and staff motivation.

8.6 TRIANGULATION

The study opted for a mixed methods approach to reap the benefits of complementarity, where the strengths of one research method enhanced the performance of another research method (Morgan, 1998:365). Combining quantitative and qualitative research broadened the understanding of the research subject by using one approach to explain or build on the results from the other approach (Creswell, 2009:204). Smith and Lewis (2011:63) refers to a verification, confirmation, or triangulation process.

The value of mixed methods resides in ensuring the accuracy of data (verification) that was collected from active retail customers (quantitative survey) through follow-up in-depth interviews with retail store management and training specialists under a qualitative phase (Chapman *et al.*, 2005:23). The complementary exploratory qualitative phase thus enabled the researcher to further examine and obtain clarity on any surprising results derived from the quantitative study (Creswell, 2009:211; Creswell & Zhang, 2009:614).

Turner *et al.* (2015:26) refer to the building blocks of triangulation-based mixed methods research as generality, accuracy, and simplicity of theory. Generality refers to applications across a broader range of settings. Accuracy refers to how well the predictions derived from the theoretical explanation correspond with the actual state, and simplicity refers to explanations that are considered more elegant due to fewer variables required to explain a phenomenon (Turner *et al.*, 2015:26). The triangulation observed in the study between the literature study, quantitative and qualitative findings not only support verification (accuracy) and clarity but also generality and simplicity of theory.

Retail management and retail training participants' responses (qualitative study) corroborated and confirmed active retail customers' responses (quantitative study) regarding the impact (the "why") of each of the 12E constructs, their applicability, validity, and efficacy. The qualitative study further augmented quantitative study findings on the 12Es in suggesting pragmatic retail store tactics that could be considered to stage, support and manage the twelve key drivers (12Es) of the experience management framework.

In observing the outcome of the literature study and the findings of the quantitative and qualitative studies, the researcher concluded that triangulation was observed in responses from the major constituents of the retail industry, namely the retail customers and retail management/retail training specialists. This provided clarity and delivered in-depth insights, ensuring high construct validity on the research topic (Harrison & Reilly, 2011:15).

The next chapter, Chapter 9, discusses the quantitative and qualitative research findings linking the research frameworks and findings, the research propositions, and the study's objectives. It provides a summary of research questions and findings, recommendations, the contribution and limitations of the study and recommendations for future research.

CHAPTER 9 FINDINGS, CONTRIBUTION AND CONCLUSIONS

9.1 INTRODUCTION

This chapter is the culmination of literary, quantitative, and qualitative research. The research sought confirmation that implementing a pragmatic, multifaceted customer-centric experience management framework entrenched in a retail store customer journey can bridge the discrepancy between customers' retail store experience expectancies and customers' actual in-store retail experiences.

The chapter provides an overview of the content of the study objectives, summarises the overall findings and discusses the study's contribution to marketing theory. It also proposes recommendations to South African retail management, identifies study limitations, and suggests future customer experience research opportunities.

9.2 PROBLEM STATEMENT AND STUDY OBJECTIVES

As extensively reported, with literary support spanning several decades, implementing customer experience strategies, or any other intervention in this regard, does not always deliver the sought-after results of improved customer experience ratings. The Harvard Business Review aptly documented this frustration, stating that “despite all the effort and money poured into CX tools by companies, customer satisfaction continues to decline” (Thomas *et al.*, 2023). This phenomenon stretches across continents with sophisticated and unsophisticated economies and is not limited to the South African retail industry only.

In investigating the well-documented ‘expectation-gap’ between retail customers and retail business entities, the study conducted an in-depth literature review. The review dissected theories related to customer expectation, service design and customer journeys. From the review, the retail service concept was deconstructed into the ‘what’ and ‘how’ and various elements of a service concept were identified. These elements were examined against retail customers' in-store needs, wants, and requirements and provided guidelines for synergistically designing and delivering the identified elements.

9.3 STUDY OVERVIEW

In addressing the problem of a discrepancy or disconnect between a customer's expected customer experience and the experience provided by a retailer, the study first sketched the origin of the problem as observed from extant literature (Chapter 1). It then presented the

evolutionary development of the customer experience philosophy to identify the most important inter-connecting antecedental marketing concepts to the philosophy that originated in the 1950s, but only evolved to maturity sixty decades later (Chapter 2).

Chapter 3 provided the basis for an integrated approach through detailed insights into marketing theory's various customer experience definitions. The chapter aimed to suggest a consolidated, all-encompassing definition of customer experience that provides the opportunity for creating, staging, or engineering customer experiences through the application of service design principles, as discussed in Chapter 4. It also provided the basis for applying customer journeys as a customer experience enabling tool culminating into a purposefully designed retail store service system and a self-correcting continuum of distinct retail store constructs (12Es) as proposed in Chapter 5.

Chapter 6 provided the background to the research undertaken by referring to the reason for the research, the research philosophy, the problem, the questions, and the research objectives. It discussed the research methodology and design to address the research problem, provided answers to the research questions, and executed the study's objectives. This was followed by Chapter 7 (quantitative study) and Chapter 8 (qualitative study) to establish the value in practice among active retail customers and retail management and retail training specialists, and implicitly, the contribution of the conceptual experience management framework to marketing theory. The primary objective of both empirical studies was to evaluate (triangulate) the applicability, validity, efficacy, and impact of each of the 12E service system components' potential effects on customer experience levels.

9.4 SUMMARY OF RESEARCH QUESTIONS AND FINDINGS

From the literary review, quantitative and qualitative research, the study presented that a well-defined, structured, and implementable customer-centric management framework, consisting of a customer experience journey based on a tailored in-store retail service flow design, could assist retail stores in understanding what, where, when, and how customer flow experiences, based on customer expectations, can be designed. It is postulated that the successful implementation and management of a customer-centric framework should lead to higher levels of customer experience, promote emotional connectiveness with customers and thus, have a positive impact on customer acquisition, retention, and growth. The management framework aims to close the divide between customer experience expectations and the experience provided by a retail service provider.

9.4.1 Quantitative findings

The quantitative phase of the sequential explanatory mixed-method study focussed on a sample of 407 active retail customers to test the applicability, validity, efficacy, and impact of twelve key customer experience constructs (12Es) associated with a customer's journey through a South African retail store.

The study's sample size of 407 participants was more than the 300-participant rule of thumb. Results of sample size and correlation scores (Chapter 7: Table 7-4 & Table 7-5) reflected acceptable sample adequacy. Considering the reliability and descriptive statistics of the 12E construct scores (Table 7-7 & Table 7-8) signified acceptable reliability of constructs and confirmed the reliability attributes of homogeneity, stability, and equivalence.

Findings from an Exploratory Factor Analysis (EFA) concerning the twelve experience constructs associated with a retail store customer journey revealed that more than 88% of respondents, on average, tended to agree and strongly agree that retail tactics associated with the twelve customer experience constructs (Expect, Expose, Excite, Enter, Explore, Experience, Engage, Exchange, Embrace, Execute, Exit, Enhance) can have a positive influence on a customer's overall shopping experience (Table 7-2 & Table 7-7). These agreements cut across all sample age, level of education, home language, profession, and geographical location groups.

In assessing responses regarding the impact of customer retail experiences, it showed that more than 91% of respondents, on average, tended to agree and strongly agree that customer experience has an impact on customer engagement, customer satisfaction and customer re-patronage (Table 7-2 & Table 7-8). More than 93% of the respondents agreed and strongly agreed that customer engagement impacts customer patronage. More than 95% of respondents, on average, tended to agree and strongly agree that customer satisfaction impacts customer patronage. These agreements cut across all age, level of education, home language, profession, and geographical location groups.

As a second phase of the quantitative study, structured equation modelling (SEM) was performed to establish the validity of the conceptual model and how well the model explains the observed covariance matrix among measured variables. It was used to examine the structural (causal) relationship between customer experience, customer satisfaction, customer engagement and customer re-patronage behaviour, where customer satisfaction and customer engagement acted as mediators.

Initial SEM results on the causal relationships between Customer Experience and Patronage mediated by Satisfaction and Engagement indicated that all applicable fit indices confirmed a reasonable model fit (Figure 9-1).

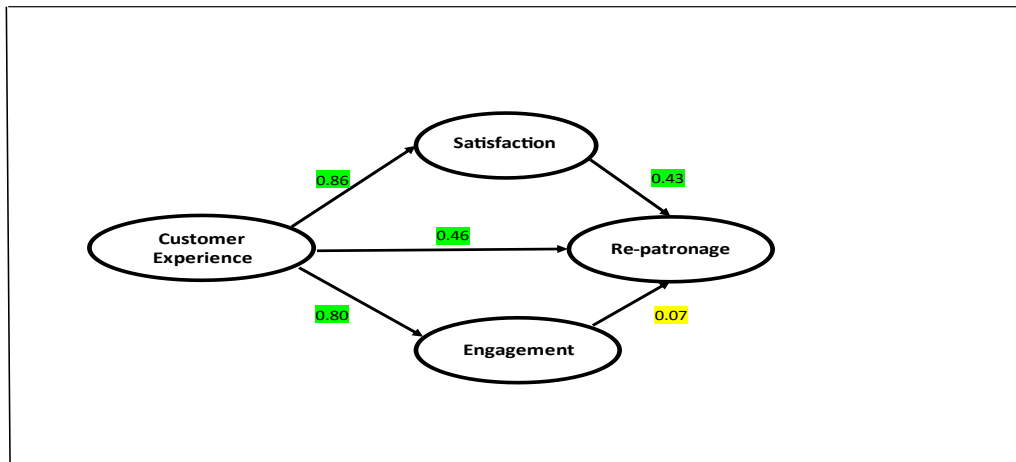


Figure 9-1: Relationship between Customer Experience and Re-patronage mediated by Satisfaction and Engagement

Although the model was considered a reasonable fit, the path between Engagement as a mediator, and Re-patronage was borderline and insignificant. This casts doubt on the strength of the contribution of Engagement on Re-Patronage. Given this finding, a revised model was fitted to the data. In this case, the mediation through the Engagement path was omitted from the model. The revised measurement model without the Engagement construct is reflected in Figure 9-2.

Fit indices related to the alternate model also provided for a reasonable fit, and if compared with the initial model, the differences were marginal. However, the alternate model indicated that although the active retail customers surveyed placed a high premium on customer engagement within a retail store, the SEM does not acknowledge a significant mediation role of engagement on re-patronage (loyalty).

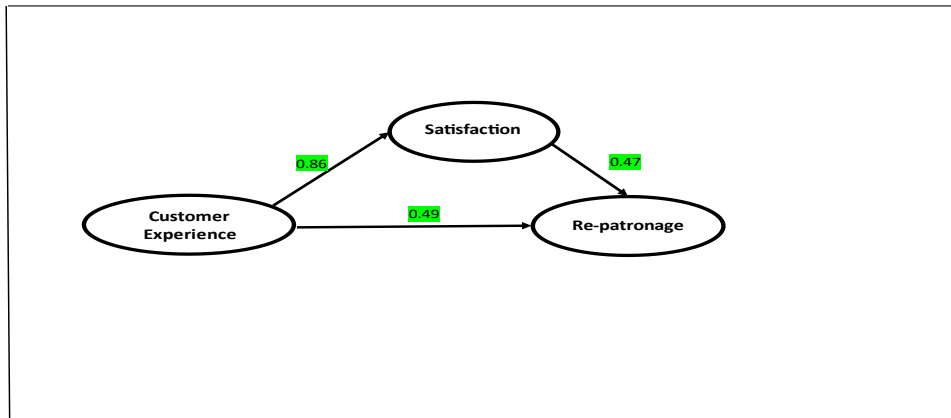


Figure 9-2: Relationship between Customer Experience and Repatronage mediated only by Satisfaction

This finding within the South African retail customer context questions the mediation effect that customer engagement has on customers' intentions to re-visit a retail store. Though highlighted as important regarding a customer in-store experience, it does not significantly impact re-patronage intentions. This finding has to be further researched in a broader context, as marketing literature places a high premium on customer engagement as an important prerequisite for customer patronage.

9.4.2 Qualitative findings

The secondary phase of the sequential explanatory mixed-method study, the qualitative study, surveyed the views of a purposefully selected sample of seventeen retail store managers and retail training specialists regarding the current state of customer experience in the South African retail industry. Participants were questioned on the existence of a possible mismatch between retail customer expectations and the level of service experienced at retail stores and the reasons for such a mismatch if it exists. The study participants were then surveyed on the applicability, validity, efficacy, and impact on customer experience levels of the experience management 12E elements.

Most participants (76%) believe a mismatch exists and identified several root causes that can contribute to the mismatch. The root causes consisted of five elements (training, goalsetting, management, business acumen, trust) that emerged from the thematic analysis (Chapter 8, Table 8-5), which were consolidated under one theme, retail leadership (Chapter 8, Table 8-6). Retail management requires retail leadership "to engineer the customer's experience in such a way as to create value both to the customer and the firm" (Verhoef *et al.*, 2009:38).

Though positive towards their own company's performance, 70% of participants regarded the customer experience performance of the South African retail industry as poor. Participants cited consistency, service and product quality, staff motivation, commitment, and accountability as the most important problem areas. References were also made to poor customer communication, customer experience, and customer service tactic implementation. More than 76% of participants ascribed a mismatch between customer expectations and the level of service experienced at retail stores as the reason for poor performances. Staff attitude and training, retail management's CE understanding, staff support, staff motivation, lack of customer education, and a focus on too-high profits were identified as the mismatch's root causes.

Participants regarded authentic relationships with customers through all interactional phases and meeting customer expectations as synonymous with the customer experience and a prerequisite for sustained profits. Participants indicated that the drivers for achieving this rest with staff's hard and soft skills, retail atmospherics and business processes, and analyses of customer expectations followed by a customer experience strategy supported by appropriate tactics.

The qualitative study also surveyed the applicability, validity, efficacy, and impact of the customer-centric experience management framework. This is to assist in explaining, enhancing, and corroborating initial data obtained from the quantitative study and address the framework's tactical 'how-to-execute' more comprehensively. The latter referred to pragmatic retail store tactics that could be considered to stage, support and manage the twelve key constructs of the experience management framework.

Retail management and training participants overwhelmingly indicated that each 12Es greatly impacts customer experience (Chapter 8: Tables 8-9 to 8-20). A summary of participant responses (Table 8-22) showed that the most detailed responses (194 out of 204) signified that the 12Es significantly impact customer experience. A few responses (5) indicated a low impact, while another five indicated no opinion.

9.4.3 Conclusion

The study's primary objective was to present an integrated customer-centric experience management framework to reduce the discrepancy between retail customers' experience expectancies and customers' actual in-store retail experience, resulting in increased customer experience levels that positively impact customer engagement, satisfaction, and re-patronage.

The extensive literary review identified the roots of the customer experience construct in marketing theory. It indicated the important role a retail customer journey, based on a service flow design supported by store environmental clues, can play in bringing forth multi-dimensional customer experiences. Extant literature also confirmed that the management framework's service system components (12Es) can trigger customer emotions that elicit positive customer experiences.

The mixed method empirical research results supported the literary review findings, enabling triangulation that provided an affirmative answer to the primary research question. The experience management framework focuses on a continuum of action-orientated customer journey interventions (12Es) that can bridge the discrepancy between retail customers' experience expectancies and customers' actual in-store retail experience, leading to improved customer experience levels.

9.5 CONTEXT TO THE STUDY'S CONTRIBUTION

It was highlighted in the literary review that store environment research generally lacked a comprehensive examination of key issues related to customer experience, store patronage, and perceived merchandise value. Researchers maintained that although some studies offered conceptual and empirical support for various hypothesised relationships, a void remains: it only focused on selected hypothesised links per study.

In the context of the identified study problem, the study's objective was to fill the void practically and not simply superficially transfer knowledge. It was to propose a management framework with clear, identifiable focus areas supported by implementable tactics that are relevant and practical for retail practitioners to apply to the benefit of their businesses.

The foundational literature review supported by empirical research aspired to enrich marketing and retail practitioners with relevant and practical implementable knowledge to enhance retail customer experiences and create a strategic competitive positioning in the marketplace.

The study contributed to marketing theory and customer experience research on several layers. The following three areas acted as layers or building blocks that added a fresh and significant value to the existing customer experience body of knowledge. These layers formed the basis and provided the context from which the study's unique contribution can be articulated.

9.5.1 Broadening the customer experience research focus

The study examined the core constituents of these theories through an extensive and detailed literature review of customer experience, service system and customer journey. This provided a sound basis to identify opportunities for a synergistic integration to reduce the earlier identified void in customer experience research, which often only focused on hypothesised links per study and not all links associated with a comprehensive retail model.

The study filled a research gap identified in the literature to indicate the linkages between customer experience and customer journeys and strengthen the overall conceptualisation of customer experience and customer journeys by introducing and applying a mediator called 'system design'. The detailed literature review revealed the relationship between customer experience, the application of service design principles, and customer journey methodology in retail customer journey design, paving the way for a synergistic sequential application in a retail store environment.

In exposing the integrities and synergistic opportunities in the three elements, the study proposed an answer on how to bridge the gap between what retailers intend to provide (strategic intent) and what customers require or expect (customer needs). In the dissection of the applicable theories, the study deconstructed the service concept into the 'what' and 'how', identified the various elements of a service concept, verified it against retail customers' in-store needs, wants, and requirements and in so doing provided guidelines for the design and delivery of those elements. It highlighted, in a broader sense, how the retail customer journey can influence a customer's decision to patronise a particular store and to present supporting research to understand how the customer journey can impact customer experiences.

The study not only considered the three variables in detail, showed the potential that exists in a synergistic sequential application there-off in a retail store environment but also provided the following integrated, all-encompassing, and unified customer experience definition that supports the holistic nature of the construct as reflected in research studies:

Customer experience represents non-deliberate, spontaneous, subjective, context-specific and transformational multi-sense (emotional, cognitive, behavioural, sensorial, and social) customer impressions, perceptions, judgements of value and responses and reactions to internal and external elements (shop design, service staff behaviour, products and services, self-help technologies, access to information, customer participation, prevailing macro-economic environment) through the customers' conscious/unconscious screening of stimuli encountered during direct and indirect exchanges with a market provider throughout the total shopping

journey (searching, purchasing, consumption and after-purchase), aimed at touching the customer in an intrinsic personal manner that leads to a positive, participative, and long-lasting relationship that is appealing and beneficial to both customer and market provider.

This definition, informed by literature reviews, provided the basis and motivation for the practical synergistic integration and application of the three elements, customer experience, system design and customer journeys, into an experience continuum based on sensory marketing and behavioural science principles and constructs.

9.5.2 The introduction of the trinity of customer experience marketing

The sustainability of improved customer experience levels is at the core of the study's problem statement. The study suggested that a high level of sustainability can be introduced, promoted, and achieved if marketing research focuses more on obtaining a dynamic equilibrium between customer experience, service design and customer journey. The study branded the three variables as the '*customer experience trinity*' of marketing (Figure 9-3).

After reviewing the theory behind the customer experience trinity, the study concluded that its dimensions are not paradoxical and promote developing a customer-experience management framework to offer built-in process rigidity.

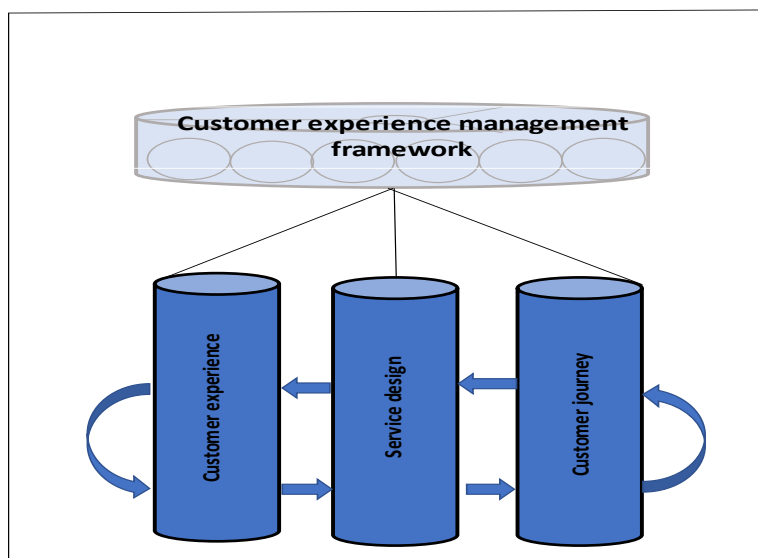


Figure 9-3: The trinity of customer experience marketing

The study acknowledged that much compartmentalisation exists in customer experience, service design and customer journey mapping research. Sometimes, these philosophies and methodologies are seen as opposing and not complementary. It supported the call for and

proposed a conceptual integration providing for the conceptualisation of experiences along various in-store experience dimensions. It suggested that experience dimensions should include sensory-affective, cognitive-intellectual, and behaviour and action-oriented components. Moreover, because experiences are evoked by environmental cues, social and relational elements are also important aspects of experiences.

The customer experience trinity promoted in the study provided for such an integrated approach, which is still foreign to most retail companies. It intended to contribute to advancing a more effective application of service design in customer journeys. Research confirmed that intentionally designed customer journeys can impact customer buying behaviour, patronage intentions and loyalty, especially if supported by a continuum of retail action-orientated customer-organisational behavioural constructs.

9.5.3 A customer-centric experience management framework

The study's primary objective is to present a framework for the comprehensive conceptualisation of an integrated process of multi-sensory action-orientated constructs to address the gap between retail customers' experience expectancies and customers' actual in-store retail experience. Not much evidence exists that retailers and their advisors attempted to anchor the vocabulary and the use of experience metaphors in a practical, implementable experience continuum. The need arose for an experience continuum that is made practical through a service-designed customer journey based on sensory marketing and behavioural science principles and constructs.

Theorising on, and empirically investigating store environmental elements, selling techniques and retail action constructs resulted in the identification of flexible, manageable retail service system components. These components are sequenced together into a customer-centric experience journey continuum that has the potential to influence customer experience within a brick-and-mortar retail store positively. It serves as a platform for a much-needed operational strategy for physical store-based retailers in the competitive world of retailing.

The study presented a comprehensive customer-centric management framework for an in-store customer experience journey based on three first-order resource pillars: the customer experience philosophy, service design practices and customer journey methodologies.

Based on the three pillars, the customer experience management framework consists of a high-level sequence of retail store journey constructs applied to the three stages of customer experience (pre-purchase, purchase, post-purchase.) The continuum of twelve dynamic retail

store constructs (12Es), derived from marketing and environmental psychology, should form the nucleus of retail management's responsibilities (Figure 9-4).

The recommended activity-based constructs suggest a pragmatic retail approach anchored in an ergonomically designed retail store layout, a complementary in-store service design, and a customer-focused service ethos. It represents practical service process steps, supported by retail store tactics, that retail customer journeys should comprise, and customers should embrace to elicit specific experiences and reactions when they make in-store purchase decisions.

Each action-based construct variable in the experience journey framework should be supported by practical, executable, action-orientated sub-elements and retail tactics for ease of operationalisation, implementation, and execution. The application of the twelve construct variables can be broadened to more accurately define practical service action steps to make provision for all types of retail entities. It can easily be aligned to fit any retail store and can be controlled and managed by retailers.

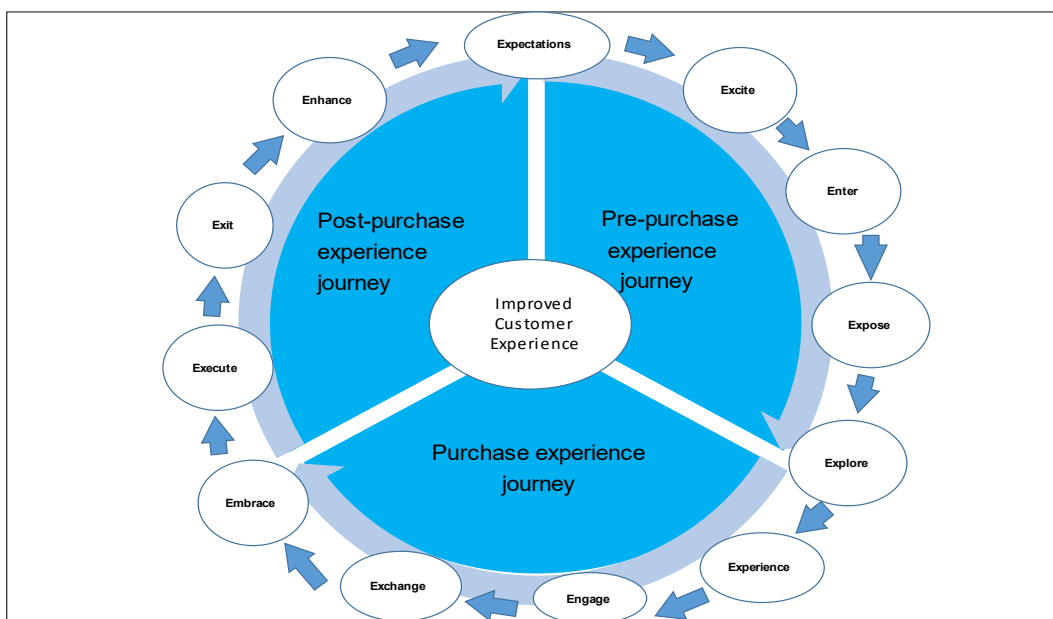


Figure 9-4: Customer-centric experience management framework

With these building blocks as context, the study's unique contribution was concluded and presented as a critical success factor roadmap for implementation and management.

9.6 STUDY CONTRIBUTION

Retail management, representing all levels of management, and retail training specialists indicated pragmatic retail-orientated tactics that could be considered to stage, support and

manage the twelve key drivers (12Es) of the study's experience management framework. These action-orientated tactics should, by default, be included in any retail customer experience journey adapted to fit the context of a particular retail entity to address practical challenges or opportunities for business.

The retail-orientated tactics were validated and borne out by extant literature and were consolidated thematically into a Critical Success Factor Roadmap reflecting the experience management framework and the tactics that could aid, support, and strengthen the framework implementation for a South African retail entity. The critical success factors included leadership, customer experience strategy, systems/processes/technology, staff, information management and atmospherics/merchandising.

The Critical Success Factor Roadmap (Figure 9-5) also indicated the positive outcomes should retail companies succeed in promoting higher levels of customer experience. As supported by extant literature, the positive outcomes comprised customer retention, customer referrals, business continuation (retail company growth and increased profits) and increased staff motivation.

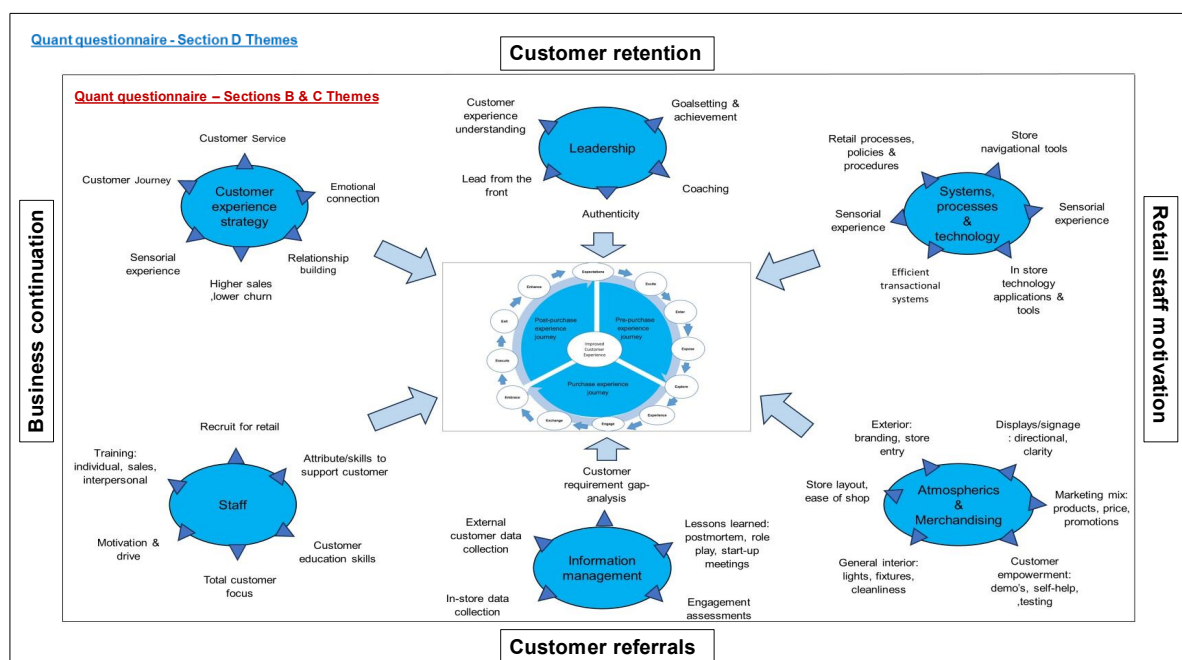


Figure 9-5: Critical success factor roadmap with customer experience impact benefits

9.7 LIMITATIONS OF THE STUDY

The following limitations should be considered before adopting the customer experience management framework for any retail entity:

- The study focussed on a retail in-store customer journey only, not a retail company end-to-end customer journey as most of the customer journey research does.
- The study focused on the South African Communication Sector operating as Communication Service Providers (CSP) through owned and operated retail stores networks.
- The study did not focus on online retail shopping, though these channels also feature among CSP's.
- The identified experience continuum constructs, the 12Es, are hybrid of nature and each construct, depending on the type of retail entity where implemented, can represent a different mixture of services cape, staffing, training, and retail management variables.
- The number of experience constructs (12) is not fixed, not of the same importance, and do not necessarily apply to every retail entity. The applicability of each of the 12 constructs depends on the type of retail entity. The management framework can, however, be extended depending on customer needs to include other constructs as well.

9.8 RECOMMENDATIONS FOR FUTURE RESEARCH

The customer-centric experience management framework suggests a benchmark from which other frameworks can be developed and implemented to support a more pragmatic approach towards managing customer experiences. It is proposed that attention be given to the following in enhancing, refining, and building on the experience management framework:

- Further research on the detail of each of the 12E constructs to develop applicable retail tactics suitable to address and adapt to changes in customer expectations.
- It is also recommended that further research be conducted on the applicability, validity, efficacy, and impact of each of the 12E service system components' potential effects on customer experience levels in other retail-related domains. The application can also be used beyond retail in situations requiring customer interactions, e.g., consultants and other service providers.
- Further research on the experience dimensions, specifically regarding the inclusion of additional or complementary sensory-affective, cognitive-intellectual, and behavior and action-oriented elements.

- Developing a 12E measurement scale for different entities in the retail industry.
- Further customer experience research could focus on the mediator role of customer engagement in advancing customer patronage or customer loyalty.
- A deeper focus on digital channels, the role of digital integration and a deeper exploration of how online and offline experiences integrate and affect customer perceptions and behaviours should be considered.
- The role and impact of cultural factors on customer expectations and experiences could be included in future research to make findings more nuanced and applicable in instances of diverse consumer segments.
- The customer-centric experience management framework is an instrument to bridge the gap between customer expectations and customer experiences. Research must confirm that the extensively reported “expectations gap” in retail is an expectation gap, not an experience gap. An expectation represents a projection, while an experience represents the reality of what the customer encounters in the retail services industry. This dichotomy should be clarified.

9.9 CONCLUSION

Through the customer-centric experience management framework entrenched in a retail customer journey, the study proposes an answer to Goldstein’s “missing link”, that is, how to bridge the gap “between what the organisation intends to provide (its strategic intent) and what its customers may require or expect (customer needs)” (Goldstein *et al.*, 2002:124).

It proceeds by observing Goldstein’s suggestion to deconstruct a service “into the what and the how or into its components”, with the intent to “identify the various elements of a service concept, check them against customers’ needs, and then design and deliver those elements” (Goldstein *et al.*, 2002:124). It endeavours to answer the critical question posed by Baker *et al.* (2002:120), “In a broader sense, in what way does the retail environment ultimately influence a customer’s decision to patronise a particular store?” and to present “additional research to understand how the store environment, impacts the customer experience specifically in a retail context.” (Verhoef *et al.*, 2009:35).

Through a conceptual integration approach, the study endeavours to reduce the void in customer experience research and focus on the multiple links associated with a comprehensive retail patronage continuum. It also endeavours to fill the research gap calling for strengthening

the overall conceptualization of customer experience and, especially, the customer journey methodology by proposing a comprehensive list of implementable action-orientated customer-organisational behavioural constructs.

More importantly, the study suggests that implementing the experience management framework in a retail environment should answer why customer experience ratings do not increase despite all the effort and money poured into promoting increased customer experiences.

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APPENDIX A: QUANTITATIVE QUESTIONNAIRE



Dear Respondent

Re: Research questionnaire on the development of a customer centric management framework within the retail industry

My name is Leo Stander, and I am conducting a research project under the supervision of Prof JJ Prinsloo as part of a Doctor of Philosophy (PhD) Degree at the North-West University School of Business & Governance. The primary objective of my studies and research is to propose a **customer centric experience management framework for the retail-based industry through which retailers can improve their customers' shopping experiences.**

Thank you very much for your willingness and active participation to improve the customer experience levels in the South-African retail market by completing this questionnaire. The questionnaire seeks to obtain your input as to the applicability, validity, and possible efficacy of 12 key focus areas through which retailers can improve such experiences.

Completing the questionnaire may take half an hour to an hour. **Please answer all the questions.** There are no right or wrong answers. Should you request for an electronic copy of the final thesis, this will be sent to you on completion.

Participation in this study is entirely voluntary. If there are any other questions you prefer not to answer, you have a right to do so. I, as the researcher, undertakes full responsibility to honour the fundamental ethical principles of social research, namely:

- Ethical clearances will be obtained from the ethics committee for approval before research will commence.
- All research work will be conducted in an honourable manner, always treating the participant with respect and dignity.
- The participant's identity will be held confidential, anonymous if required.

- The participants will be well informed of all relevant procedures and methods of the study.
- Participants have no risk of participating in the study.
- Participants can withdraw should they want to.

Should you have any concerns or questions relating to the study or would like additional information in deciding on participating, please feel free to contact:

Researcher - Leo Stander +27 813474070 blumendahls@gmail.com

Supervisor - Prof. JJ Prinsloo +27 18 3892387 Hein.Prinsloo@nwu.ac.za

Your assistance in participating in the study would be greatly appreciated.

Thank you,

Leo Stander

Section A: Retail customer centric experience management model

This section deals with the customer journey experience factors that should be considered in the design and implementation of a **customer centric experience management framework** aimed at retail shop entity.

Please indicate the extent to which you agree or disagree with the following statements by placing an X in the appropriate box.

Retail management should focus on...	1	2	3	4	5
Determining and executing on customer need-and-want <u>expectations</u>	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree
1. Customer' need-and-want expectations have a direct impact on the level of their in-store retail experiences?					
2. Retail entities should formally embark on market studies to determine their customers' need-and—want expectations?					
3. Retail entities should continually adapt to changes in customer need-and-want expectations?					
4. Compliance to, or fulfilling customer expectations , can lead to higher levels of in-store customer experiences.					
5. Non-compliance to customer expectations can have a negative impact on in-store customer experiences.					

Retail management should focus on...	1	2	3	4	5
<u>Exposing</u> customers to physical evidence that they own up to customer' expectations	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree
6. Retailers stating publicly their adherences to customer expectations is enough evidence that they do so.					
7. Physical evidence at retail store level of compliance to customer need-and-want expectations can impact positively on customer experiences.					
8. Non-demonstration of compliance to customer expectations can have a negative impact on customer in-store retail experiences.					

Retail management should focus on...	1	2	3	4	5
Exciting customers with store layout, products, prices, promotions etc.	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree
9. Retail customers want to be excited by ease-of-shop store layouts, a stimulating store atmosphere, thrilling store promotions and competitive offerings?					
10. Retail stores that succeed in increasing in-store customer excitement and create a pleasant and rewarding shopping experience can increase overall customer experience levels.					
11. Boring, normal everyday retail store settings can negatively influence the customer shopping experience.					

Retail management should focus on...	1	2	3	4	5
Customers' reception when entering store	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree
12. The reception , (ease of entry, welcoming and courteous) at a retail store is important to customers?					
13. The customers' experience at store entry can play an important role in the customers' overall retail store experience?					
14. Special attention to elements that contribute to an exhilarating first impression of store at entry can contribute positively to a customer's journey experience through the store?					
15. A mediocre experience at store entry can negatively impact on customers' impression, perception, opinion, and overall shopping experience?					

Retail management should focus on...	1	2	3	4	5
Enabling customers to explore the store fully and comprehensively	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree
16. Customers appreciate the opportunity to explore a store within a store layout that encourages store exploration.					
17. Exposure to ergonomically well planned , clearly signed, specified, and structured store journeys can positively contribute to a shopping experience.					
18. Cluttered , unorganised, unimagine-tive store layout can hinder store exploration and can negatively affect shopping experiences.					

Retail management should focus on...	1	2	3	4	5
Allowing customers to physically experience the products (touch, feel, test)	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree
19. It is important to customers to touch , feel, smell, examine and test retail merchandise while browsing.					
20. Customers having the opportunity to physically engage with store merchandise can positively influence their shopping experience levels.					
21. Inhibiting store displays and store selling techniques, depriving customers to fully experience merchandise, can negatively impact the overall shopping experience levels.					

Retail management should focus on...	1	2	3	4	5
How to engage customers in the correct manner	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree
22. Customers appreciate well trained and knowledgeable store staff engagements during their journey through the retail store.					
23. Timely and considerate staff-to-customer engagements can positively impact the overall customer shopping experience?					
24. Poorly timed and haphazardly executed staff engagements with customers can negatively impact the overall shopping experience.					

Retail management should focus on...	1	2	3	4	5
Staff and customer interactive conversational exchanges during the customer in-store shopping journey	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree
25. Customers appreciate and hold in high regard the timely availability of store staff to assist during the shopping journey.					
26. Customer conversational exchanges with knowledgeable, appreciative, courteous , and interpersonally skilled staff can have a positive impact on shopping experiences.					
27. The absence of shop staff when required or customer conversational exchanges with poorly trained or interpersonally unskilled staff can have a negative impact on shopping experiences.					

Retail management should focus on...	1	2	3	4	5
Empowering staff to invite, discuss and embrace customer needs, requirements, opinions, and comments in customer engagement sessions.	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree
28. Customers appreciate staff embracing and responding to their unique requirements , their opinions, and comments and/or their questions on merchandise and offers.					
29. Embracing customers' requirements through attentive listening and receptive skills can have a positive impact on customer shopping experiences.					
30. The absence of appreciation shown for customer needs , requests, problems, comments, or opinions in favour of a hard sales push approach can negatively impact a customer shopping experience.					

Retail management should focus on...	1	2	3	4	5
The process on how to effectively execute and conclude a sales transaction.	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree
31. Customers appreciate and value a speedy and efficient executed sales transaction.					
32. Processing a sales transaction in a friendly and efficient manner can have a positive effect on customer shopping experiences.					
33. Processing a sales transaction in a good-riddance-manner through, ineffective and inadequate point-of- sale technology, can have a negative impact on the customers shopping experience.					

Retail management should focus on...	1	2	3	4	5
The process of customers exiting the retail store	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree
34. The customer shop exit process should be regarded as an important concluding element of a customers' in-store retail journey.					
35. A courteous well executed exit process leaving a customer with a lasting good impression can have a positive impact on a customer' overall shopping experience					
36. A poorly executed customer exit process can result in a negative after sale experience and can have a negative impact on the overall shopping experience.					

Retail management should focus on...	1	2	3	4	5
Enhancing and constantly updating customer expectations	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree
37. Customers value the opportunity to provide retail entities with shopping experience feedback that can lead to improved customer experiences.					
38. Retail entities sourcing experience feedback from customers and positive reactions thereto by implementing suggested enhancements can ensure higher levels of future customer experience.					
39. Retail entities sourcing customer experience feedback but refraining from executing the suggested enhancements might lose customers and cause them to switch to competitors.					

SECTION B: Impact of good and satisfying customer experiences

This section deals with the after-effect or the impact of a customer having a pleasant and fruitful customer retail experience.

Please indicate the extent to which you agree or disagree with the following statements by placing an X in the appropriate box.

Customer experience has a direct effect on...	1	2	3	4	5
Customer engagement and customer satisfaction levels	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree
40. A good, bad, or indifferent customer experience is important to a retail company's survival and sustainable growth.					
41. Highly rated customer experiences can have a positive effect on customer engagement and customer satisfaction levels.					
42. Poorly rated customer experiences can result in low customer engagement and customer satisfaction levels.					

Customer experience has a direct effect on...	1	2	3	4	5
Customer re-patronage behaviour	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree
43. Highly rated customer experiences can have a positive impact on customer retention and customer re-patronage.					
44. Poorly rated customer experiences can have a negative impact on customer retention and customer re-patronage.					

Customer satisfaction and customer engagement has a direct effect on ...	1	2	3	4	5
Customer re-patronage behaviour	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree
45. Customers who are satisfied and engaged would be more likely to remain with a particular retail entity.					
46. Customers who are not satisfied and/or engaged would be more likely to switch to other retailers					

SECTION B: Demographic data

This section deals with the demographic data of the participant.

Please provide the required information by placing an X in the appropriate box.

47. Your gender (optional)

	Gender	Response
1	Male	
2	Female	
3	Other	

48. Your age

	Age	Response
1	20 – 30 years old	
2	31 – 40 years old	
3	41 – 50 years old	
4	Over 51 years old	

49. Level of education

	Education Level	Response
1	Secondary education	
2	Certificate (TVET/Technical college)	
3	Tertiary education: Undergraduate	
4	Tertiary education: Post-graduate	
5	Other (please specify below)	

50. Your home language group (optional)

	Language Group	Response
1	Afrikaans	
2	English	
3	isiNdebele	
4	isiZulu	
5	isiXhosa	
6	Sepedi	
7	Sesotho	
8	Setswana	
9	siSwati	
10	Tshivenda	
11	Xitsonga	
12	Other (please specify below)	

51. Your profession

	Profession	Response
1	Professional	
2	Administrative	
3	Construction/mining/maintenance	
4	Homemaker	
5	Pensioner	
6	Student	
7	Unemployed	

52. Geographic location

	Location	Response
1	Gauteng	
2	Tshwane	
3	Western Cape	
4	KwaZulu Natal	
5	Eastern Cape	

Thank you very much

Kind regards

Leo Stander

APPENDIX B: QUALITATIVE INTERVIEW GUIDE



Date: July 2023

Dear Participant

Participation request for an interview

My name is Leo Stander, and I am conducting a research project under the supervision of Prof JJ Prinsloo as part of a Doctor of Philosophy (PhD) Degree at the North-West University Business School. The primary objective of my studies and research is to propose **a customer centric experience management framework for the South African retail-based industry through which retailers can improve their customers' shopping experiences**. Your kind participation in a semi-structured interview relating to your personal encounter with retail customers' needs, wants and experience expectations, will be appreciated and can make a significant contribution to the retail industry.

The interview seeks to obtain inputs as to the applicability, validity, and efficacy of 12 key focus areas through which retailers can improve customers' experiences in retail stores. Not only will your participation in the study enable me to achieve the research objectives, but it will also enable you to identify specific areas of concern in your retail stores that can lead to improvements in customer experience creation. This might also benefit you indirectly in empowering your retail agents with the necessary skills and knowledge to deliver exceptional customer experiences and to portray your company as truly customer focused.

Conducting the interview may take half an hour to an hour, depending on follow-up questions that might be raised. With your permission granted, the discussion will be recorded by using the following methods:

- Live interviews

- Phone interviews
- Video or Zoom interviews

Participation in this study is entirely voluntary. If there are any questions you prefer not to answer, you have a right to do so. I, as the researcher, undertake full responsibility to honour the fundamental ethical principles of social research, namely:

- Ethical clearances will be obtained from the ethics committee for approval before research will commence.
- All research work will be conducted in an honourable manner, always treating the participant with respect and dignity.
- The participant's identity will be held confidential, anonymous if required.
- The participants will be well informed of all relevant procedures and methods of the study.
- Participants have no risk of participating in the study.
- Participation in the interview is voluntary.
- Participants can withdraw should they want to.

Should you have any concerns or questions relating to the study or would like additional information in deciding on participating, please feel free to contact:

Researcher - Leo Stander +27 813474070 blumendahls@gmail.com

Supervisor - Prof. JJ Prinsloo +27 18 3892387 Hein.Prinsloo@nwu.ac.za

Your assistance in participating in the study would be greatly appreciated.

Thank you,

Leo Stander

Consent to participate in the study:

Name & Surname of Participant.....

Interview date and time.....

Section A: Participant detail

1. Please indicate your employer?
2. Please indicate your position?
3. How long have you have worked in this position?.....
4. Please indicate how many stores (shops) you manage?.....
5. Please indicate in what regions (or metropolises) your stores are located?.....
6. What is your highest educational qualification?.....

SECTION B: Current retail store customer measurement and management model

7. Does your company have a formal customer experience management (CEM) process, or any other customer measurement and management process in place? If so, please identify and explain the process?

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8. Please indicate the different elements of your CEM process, or the customer measurement and management process in use? E.g., it consists of a customer journey, stages in customer journey, measurement tools, etc.

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- 9a. Please indicate and describe the level of the most recent official customer experience or customer measurement score for your company's retail stores.

- Excellent
- Very Good

- Good
- Poor
- Very Poor

9.b Please explain the reason for the rating?

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10a. Based on your experience, how would you describe the level of customer experience in the SA retail industry?

- Excellent
- Very Good
- Good
- Poor
- Very Poor

10b Please explain the reason for your rating?

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11. Do you believe a mismatch exists in the retail industry between customer expectations and the level of service being experienced at retail stores?

- Yes
- No

12. If a mismatch exists, to what do you ascribe the mismatch? Please explain.

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SECTION C: Proposed retail store customer experience management model drivers

13. What is your understanding of the concept of customer experience?

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14. What do you perceive to be the drivers for consistent high customer experience ratings?

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You are presented with a customer centric experience management framework, consisting of **twelve (12) key drivers** to enhance customer experiences within retail stores. Each of these drivers represents action orientated constructs that should by default be included in any retail customer experience journey adapted to fit the context of the retail entity. You are requested to:

- consider each of the key drivers with respect to its applicability, validity, and efficacy to influence retail customer experiences.
- indicate pragmatic retail orientated tactics to support implementation of each driver within the retail environment with the aim to improve customer experiences.

15. To what an extent do you feel that the following key drivers affect customer experiences in retail stores?

15.1 Expectations – Knowledge of customer need-and-want expectations.

a. To what an extend do you feel that **determining** and **executing** customer need-and-want expectations can impact customer experiences? Please explain.

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b. Explain briefly what retail orientated tactics can be developed and implemented to **determine, evaluate, and execute** customer need-and-want expectations?

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15.2 Expose - Exposing customers to physical evidence at pre-purchase, purchase, and post-purchase stages demonstrates that companies comply with customers' experience expectations.

a. To what an extent do you feel that **exposure to physical in-store evidence** of adherence, or not, to customer experience expectations, can have an impact on customer experiences assessments? Please explain.

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b. Explain briefly what retail orientated tactics can be developed and implemented to expose customers to physical evidence at pre-purchase, purchase, and post-purchase stages, **showing that retailers execute** on customer experience expectations?

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15.3 Excite - Exciting customers with store layout, products offerings, prices, promotions, and other marketing mix tactics.

a. To what an extent do you feel that retail customers want to experience exciting, pleasant, and rewarding retail experiences and what impact does this, or the lack thereof, have on customer experience assessments? Please explain.

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b. Explain briefly what retail orientated tactics can be developed and implemented to excite customers and positively impact customer experience assessments.

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15.4 Enter – Customers’ reception when entering a retail store.

a. To what an extent do you feel that the reception at a retail store (ease of entry, welcoming and courteous) can influence customer experience assessments? Please explain.

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b. Explain briefly what retail orientated tactics can be developed and implemented to improve the store entry experience of customers.

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15.5 Explore - Enabling customers to explore the store fully and comprehensively.

a. To what an extent do you feel that customers who **freely explore** a store and its merchandise within an ergonomically well planned, clearly signed, specified, and structured layout can influence customer experience assessments? Please explain.

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b. Explain briefly what retail orientated tactics can be developed and implemented to assist, guide, and improve customers exploring the store and its offerings.

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15.6 Experience - Allowing customers to physically experience the store merchandise (touch, feel, test).

a. To what an extent do you feel that customers having the opportunity to **freely experience store merchandise** (touch, feel, smell, examine and test retail merchandise) can influence customer experience assessments? Please explain.

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b. Explain briefly which retail orientated tactics can be developed and implemented to assist and improve customers' physical experience (touch, feel, smell, examine and test retail merchandise) of the store, staff, and store merchandise?

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15.7 Engage - How retail store staff engages customers browsing the store in manner that is conducive to a positive customer experience.

a. To what an extent do you feel that customers **engaging with considerate well trained and knowledgeable store staff** during their journey in the retail store can influence customer experience assessments? Please explain.

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b. Explain briefly what retail orientated tactics can be developed and implemented to promote staff engagements with customers with the aim to improve customers' experience assessments?

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15.8 Exchange – Staff and customer interactive exchanges and demonstrations during the customer in-store shopping journey.

a. To what an extent do you feel that the opportunity to **experience open and frank exchanges and interactions relating to the product/service choices** with knowledgeable, appreciative, courteous, and interpersonally skilled staff can impact customer experience assessments? Please explain.

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b. Explain briefly what retail orientated tactics can be developed and implemented to ensure that retail staff **engagements** with customers' support staff, performing the roles of **guide, teacher, coach, personal assistant, expert, advisor, consumer advocate, translator, persuader,**

performer, and transporter with the aim to improve customers' experiences with retail store staff?

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15.9 Embrace – Discuss and embrace customer needs, requirements, opinions, and comments in customer engagement sessions.

a. To what an extent do you feel that customers appreciating **staff embracing and responding** (cognitively and emotionally) to their **unique retail requirements**, opinions, and recommendations can influence customer experience assessments? Please explain.

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b. Explain briefly what retail orientated tactics can be developed and implemented to ensure that retail staff fully (cognitively and emotionally) embrace in-store customer behaviour in a manner that would impact positively on customer experience assessments?

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15.10 Execute - The process on how to effectively execute and conclude a sales transaction.

a. To what an extent do you feel that processing a sales transaction in a **friendly and efficient manner** through effective and adequate point-of-sale technology, and well-trained staff can impact on customer experience assessments? Please explain.

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b. Explain briefly what retail orientated tactics can be developed and implemented to ensure that retail staff effectively execute and conclude a sales transaction?

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15.11 Exit - The process of customers exiting the retail store.

a. To what an extent do you feel that the **customer shop exit process** can have a positive impact on a customer's overall shopping experience? Please explain.

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b. Explain briefly what retail orientated tactics can be developed and implemented to ensure that the process of customers exiting the retail store is conducive to a lasting positive customer experience?

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15.12 Enhance - Enhancing and constantly updating the content, context, and tactics of the eleven key drivers of customer experience with customer experience feedback.

a. To what an extent do you feel that retail entities sourcing and eliciting **experience feedback from customers** and then implement changes accordingly can impact on future customer experience assessments? Please explain.

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b. Explain briefly what retail orientated tactics can be developed and implemented to ensure an effective **process of obtaining, considering, developing, and implementing customer experience feedback** to enable fine tuning or adapting the key drivers towards improved customer experiences?

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SECTION D: Impact of good and satisfying customer experiences.

This section deals with the after-effects or the impact of a customer having a pleasant and fruitful customer retail experience, or not.

15.13 To what an extent do you feel that a good, bad, or indifferent customer experience can impact the customer satisfaction level? Please explain.

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.....

15.14 To what an extent do you feel that a good, bad, or indifferent customer experience can impact the customer engagement level? Please explain.

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15.15 To what an extent do you feel that customer experiences have a direct effect on customer retention and customer re-patronage behaviour? Please explain.

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15.16 To what an extent do you feel that customer satisfaction has a direct effect on customer re-patronage behaviour? Please explain.

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15.17 To what an extent do you feel that customer engagement has a direct effect on customer re-patronage behaviour? Please explain

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Thank you very much

Leo Stander

APPENDIX C: QUANTITATIVE STUDY ANOVA'S

APPENDIX C.1 Descriptive statistics for age

The descriptive table for age, as illustrated in Table C.1, includes Anova results Mean and Standard Deviation per age group as well as Anova and Welch p-values and effect sizes

Table C.1: ANOVA results of the age group comparisons

					Effect Size			
Age	Mean	Std, Deviation	Anova p-value	Welch p- value	18-25 years with ...,	36-45 years with ...	46-55 years with ...	56-65 years with ...
SECTION A								
Expect								
18-25 years	4.45	0.62	0.649	0.606				
36-45 years	4.43	0.74			0.02			
46-55 years	4.39	0.75			0.08	0.05		
56-65 years	4.41	0.63			0.06	0.03	0.02	
Over 65 years	4.28	0.63			0.27	0.21	0.15	0.21
TOTAL	4.41	0.67						
Expose								
18-25 years	4.08	0.76	0.822	0.793				
36-45 years	4.11	0.88			0.04			
46-55 years	4.08	0.63			0.01	0.03		
56-65 years	4.17	0.69			0.12	0.07	0.13	
Over 65 years	4.21	0.73			0.17	0.11	0.18	0.06
TOTAL	4.11	0.76						
Excite								
18-25 years	4.43	0.62	0.297	0.205				
36-45 years	4.37	0.74			0.08			
46-55 years	4.38	0.63			0.08	0.02		
56-65 years	4.30	0.61			0.20	0.09	0.12	
Over 65 years	4.20	0.55			0.36	0.22	0.27	0.16
TOTAL	4.36	0.64						

					Effect Size			
Age	Mean	Std, Deviation	Anova p-value	Welch p- value	18-25 years with ...,	36-45 years with ...	46-55 years with ...	56-65 years with ...
Enter								
18-25 years	4.38	0.70	0.889	0.895				
36-45 years	4.35	0.73			0.04			
46-55 years	4.35	0.71			0.04	0.00		
56-65 years	4.33	0.61			0.08	0.03	0.04	
Over 65 years	4.26	0.72			0.17	0.12	0.13	0.09
TOTAL	4.35	0.69						
Explore								
18-25 years	4.36	0.70	0.997	0.996				
36-45 years	4.37	0.75			0.02			
46-55 years	4.34	0.49			0.02	0.04		
56-65 years	4.38	0.65			0.03	0.01	0.06	
Over 65 years	4.35	0.51			0.01	0.03	0.02	0.05
TOTAL	4.36	0.66						
Experience								
18-25 years	4.17	0.75	0.506	0.412				
36-45 years	4.23	0.75			0.08			
46-55 years	4.35	0.60			0.23	0.15		
56-65 years	4.26	0.64			0.12	0.04	0.13	
Over 65 years	4.14	0.64			0.05	0.12	0.32	0.19
TOTAL	4.22	0.70						
Engage								
18-25 years	4.52	0.57	0.245	0.301				
36-45 years	4.39	0.75			0.18			
46-55 years	4.49	0.46			0.06	0.13		
56-65 years	4.57	0.55			0.08	0.24	0.14	
Over 65 years	4.58	0.36			0.10	0.26	0.20	0.03
TOTAL	4.50	0.58						
Exchange								
18-25 years	4.48	0.64	0.477	0.450				

					Effect Size			
Age	Mean	Std, Deviation	Anova p-value	Welch p- value	18-25 years with ...,	36-45 years with ...	46-55 years with ...	56-65 years with ...
36-45 years	4.47	0.74			0.01			
46-55 years	4.55	0.40			0.11	0.11		
56-65 years	4.62	0.54			0.22	0.21	0.14	
Over 65 years	4.56	0.46			0.12	0.12	0.02	0.12
TOTAL	4.52	0.60						
Embrace								
18-25 years	4.44	0.62	0.909	0.927				
36-45 years	4.38	0.75			0.08			
46-55 years	4.46	0.47			0.03	0.11		
56-65 years	4.46	0.50			0.03	0.11	0.00	
Over 65 years	4.42	0.54			0.03	0.05	0.07	0.08
TOTAL	4.43	0.61						
Execute								
18-25 years	4.48	0.61	0.348	0.263				
36-45 years	4.52	0.71			0.06			
46-55 years	4.58	0.47			0.17	0.09		
56-65 years	4.64	0.46			0.26	0.17	0.12	
Over 65 years	4.60	0.53			0.20	0.12	0.04	0.07
TOTAL	4.54	0.59						
Exit								
18-25 years	4.26	0.75	0.525	0.463				
36-45 years	4.26	0.74			0.00			
46-55 years	4.37	0.58			0.14	0.15		
56-65 years	4.32	0.64			0.08	0.09	0.07	
Over 65 years	4.14	0.71			0.16	0.16	0.32	0.26
TOTAL	4.27	0.70						
Enhance								
18-25 years	4.29	0.68	0.299	0.240				
36-45 years	4.19	0.78			0.13			
46-55 years	4.30	0.57			0.01	0.15		

					Effect Size			
Age	Mean	Std, Deviation	Anova p-value	Welch p- value	18-25 years with ...,	36-45 years with ...	46-55 years with ...	56-65 years with ...
56-65 years	4.15	0.61			0.21	0.05	0.25	
Over 65 years	4.10	0.60			0.28	0.11	0.33	0.08
TOTAL	4.23	0.67						
SECTION B								
Customer experience – customer engagement								
18-25 years	4.34	0.62	0.634	0.673				
36-45 years	4.30	0.79			0.04			
46-55 years	4.29	0.68			0.08	0.02		
56-65 years	4.35	0.56			0.02	0.06	0.10	
Over 65 years	4.17	0.75			0.22	0.16	0.15	0.24
TOTAL	4.31	0.68						
Customer experience – customer satisfaction								
18-25 years	4.44	0.61	0.691	0.731				
36-45 years	4.48	0.71			0.06			
46-55 years	4.51	0.50			0.12	0.04		
56-65 years	4.48	0.56			0.07	0.01	0.05	
Over 65 years	4.35	0.75			0.12	0.18	0.22	0.18
TOTAL	4.46	0.63						
Customer engagement – customer intent (re-patronage)								
18-25 years	4.32	0.74	0.457	0.426				
36-45 years	4.34	0.80			0.03			
46-55 years	4.38	0.54			0.08	0.05		
56-65 years	4.45	0.58			0.17	0.13	0.11	
Over 65 years	4.20	0.81			0.15	0.18	0.23	0.31
TOTAL	4.34	0.72						
Customer satisfaction – customer intent (re-patronage)								
18-25 years	4.49	0.65	0.289	0.218				
36-45 years	4.42	0.87			0.08			
46-55 years	4.54	0.45			0.09	0.14		
56-65 years	4.58	0.49			0.14	0.18	0.06	

					Effect Size			
Age	Mean	Std, Deviation	Anova p-value	Welch p- value	18-25 years with ...,	36-45 years with ...	46-55 years with ...	56-65 years with ...
Over 65 years	4.33	0.68			0.23	0.10	0.31	0.36
TOTAL	4.48	0.67						
Customer experience – customer intent (re-patronage)								
18-25 years	4.48	0.67	0.680	0.631				
36-45 years	4.38	0.65			0.14			
46-55 years	4.46	0.51			0.04	0.11		
56-65 years	4.50	0.54			0.03	0.18	0.08	
Over 65 years	4.39	0.69			0.14	0.01	0.10	0.17
TOTAL	4.45	0.63						

Considering the effect sizes of Section A (Table C.1), with the highest recorded effect size at 0.36, there are no practically visible or practically significant differences reported for the analyses based on Age groups.

Section B's five constructs as reflected in Table C.1, with the highest recorded effect size at 0.36, all indicated no practically visible or practically significant differences reported for the analyses based on Age groups.

APPENDIX C.2 Descriptive statistics for education levels

The descriptive table for education levels is illustrated in Table C.2 and includes measures such as the Mean, Standard Deviation, Anova and Welch p-values and Effect Size.

Table C.2: ANOVA results of the education level group comparisons

					Effect Size		
Education level	Mean	Standard deviation	Anova p-values	Welch p-values	Secondary with..	Certificate with...	Tertiary: Undergraduate with...
SECTION A							
Expect							
Secondary	4.39	0.78	0.942	0.941			
Certificate	4.44	0.58			0.05		
Tertiary: Undergraduate	4.38	0.69			0.01	0.08	
Tertiary: Post-graduate	4.43	0.64			0.04	0.02	0.06
TOTAL	4.41	0.67					
Expose							
Secondary	4.11	0.77	0.977	0.976			
Certificate	4.15	0.70			0.05		
Tertiary: Undergraduate	4.10	0.83			0.01	0.06	
Tertiary: Post-graduate	4.12	0.75			0.02	0.04	0.03
TOTAL	4.12	0.76					
Excite							
Secondary	4.44	0.69	0.176	0.170			
Certificate	4.43	0.60			0.03		
Tertiary: Undergraduate	4.36	0.68			0.12	0.10	
Tertiary: Post-graduate	4.27	0.63			0.25	0.25	0.13
TOTAL	4.36	0.65					

					Effect Size		
Education level	Mean	Standard deviation	Anova p-values	Welch p-values	Secondary with..	Certificate with...	Tertiary: Undergraduate with...
Enter							
Secondary	4.41	0.74	0.358	0.334			
Certificate	4.42	0.65			0.01		
Tertiary: Undergraduate	4.33	0.74			0.10	0.12	
Tertiary: Post-graduate	4.27	0.66			0.19	0.23	0.09
TOTAL	4.35	0.70					
Explore							
Secondary	4.31	0.76	0.485	0.477			
Certificate	4.43	0.64			0.15		
Tertiary: Undergraduate	4.41	0.63			0.13	0.03	
Tertiary: Post-graduate	4.32	0.59			0.01	0.17	0.14
TOTAL	4.36	0.65					
Experience							
Secondary	4.21	0.84	0.955	0.944			
Certificate	4.22	0.68			0.00		
Tertiary: Undergraduate	4.25	0.66			0.05	0.05	
Tertiary: Post-graduate	4.20	0.65			0.02	0.03	0.09
TOTAL	4.22	0.71					
Engage							
Secondary	4.48	0.74	0.928	0.940			
Certificate	4.50	0.51			0.03		
Tertiary: Undergraduate	4.52	0.57			0.05	0.03	
Tertiary: Post-graduate	4.53	0.52			0.07	0.06	0.02
TOTAL	4.51	0.59					

					Effect Size		
Education level	Mean	Standard deviation	Anova p-values	Welch p-values	Secondary with..	Certificate with...	Tertiary: Undergraduate with...
Exchange							
Secondary	4.54	0.75	0.572	0.509			
Certificate	4.48	0.53			0.08		
Tertiary: Undergraduate	4.46	0.64			0.10	0.03	
Tertiary: Post-graduate	4.57	0.51			0.04	0.17	0.16
TOTAL	4.52	0.60					
Embrace							
Secondary	4.46	0.72	0.827	0.805			
Certificate	4.39	0.56			0.09		
Tertiary: Undergraduate	4.40	0.65			0.07	0.02	
Tertiary: Post-graduate	4.46	0.52			0.00	0.12	0.08
TOTAL	4.43	0.61					
Execute							
Secondary	4.52	0.73	0.642	0.572			
Certificate	4.51	0.60			0.02		
Tertiary: Undergraduate	4.54	0.57			0.02	0.05	
Tertiary: Post-graduate	4.60	0.48			0.11	0.16	0.11
TOTAL	4.55	0.59					
Exit							
Secondary	4.32	0.79	0.455	0.456			
Certificate	4.23	0.70			0.11		
Tertiary: Undergraduate	4.18	0.71			0.18	0.07	
Tertiary: Post-graduate	4.31	0.64			0.01	0.12	0.19
TOTAL	4.27	0.71					

					Effect Size		
Education level	Mean	Standard deviation	Anova p-values	Welch p-values	Secondary with..	Certificate with...	Tertiary: Undergraduate with...
Enhance							
Secondary	4.27	0.80	0.728	0.782			
Certificate	4.20	0.61			0.10		
Tertiary: Undergraduate	4.16	0.71			0.14	0.05	
Tertiary: Post-graduate	4.23	0.59			0.06	0.05	0.09
TOTAL	4.22	0.67					
SECTION B							
Customer experience - customer engagement							
Secondary	4.31	0.82	0.688	0.608			
Certificate	4.24	0.63			0.09		
Tertiary: Undergraduate	4.30	0.71			0.01	0.09	
Tertiary: Post-graduate	4.35	0.59			0.05	0.19	0.07
TOTAL	4.31	0.69					
Customer experience – customer satisfaction							
Secondary	4.47	0.71	0.693	0.733			
Certificate	4.38	0.68			0.14		
Tertiary: Undergraduate	4.48	0.62			0.01	0.15	
Tertiary: Post-graduate	4.46	0.55			0.02	0.12	0.03
TOTAL	4.45	0.63					
Customer engagement – customer intent (re-patronage)							
Secondary	4.34	0.85	0.955	0.947			
Certificate	4.30	0.71			0.05		
Tertiary: Undergraduate	4.33	0.71			0.02	0.04	

					Effect Size		
Education level	Mean	Standard deviation	Anova p-values	Welch p-values	Secondary with..	Certificate with...	Tertiary: Undergraduate with...
Tertiary: Post-graduate	4.36	0.64			0.02	0.08	0.04
TOTAL	4.34	0.72					
Customer satisfaction – customer intent (re-patronage)							
Secondary	4.44	0.84	0.826	0.832			
Certificate	4.48	0.66			0.05		
Tertiary: Undergraduate	4.53	0.62			0.11	0.08	
Tertiary: Post-graduate	4.47	0.56			0.03	0.02	0.10
TOTAL	4.47	0.67					
Customer experience – customer intent (re-patronage)							
Secondary	4.46	0.70	0.881	0.899			
Certificate	4.40	0.69			0.09		
Tertiary: Undergraduate	4.46	0.66			0.00	0.10	
Tertiary: Post-graduate	4.43	0.53			0.05	0.04	0.06
TOTAL	4.44	0.63					

The effect sizes of education level group comparisons for Section A and Section B, as illustrated in Table C.2 were all below 0.26 that indicated there are no practically visible or practically significant differences reported for the analyses based on education level groups.

APPENDIX C.3 Descriptive statistics for geographical location

The descriptive table for geographical location is illustrated in Table C.3 and includes measures such as the Mean, Standard Deviation, Anova and Welch p-values and Effect Size.

Table C.3: ANOVA results of the geographical location group comparisons

					Effect Size		
Geographical location	Mean	Standard deviation	Anova p-values	Welch p-values	Gauteng with...	Western Cape with...	KwaZulu Natal with...
SECTION A							
Expect							
Gauteng	4.47	0.49	0.057	0.073			
Western Cape	4.25	0.70			0.31		
KwaZulu Natal	4.32	1.06			0.14	0.06	
Other	4.46	0.67			0.02	0.29	0.13
TOTAL	4.41	0.67					
Expose							
Gauteng	4.14	0.67	0.292	0.510			
Western Cape	4.18	0.72			0.05		
KwaZulu Natal	3.95	1.05			0.18	0.22	
Other	4.09	0.74			0.07	0.12	0.13
TOTAL	4.11	0.76					
Excite							
Gauteng	4.40	0.53	0.503	0.482			
Western Cape	4.30	0.65			0.16		
KwaZulu Natal	4.32	0.93			0.09	0.03	
Other	4.30	0.67			0.15	0.00	0.02
TOTAL	4.36	0.64					
Enter							
Gauteng	4.38	0.60	0.672	0.677			
Western Cape	4.29	0.65			0.15		
KwaZulu Natal	4.29	0.99			0.09	0.00	
Other	4.36	0.73			0.03	0.10	0.07

					Effect Size		
Geographical location	Mean	Standard deviation	Anova p-values	Welch p-values	Gauteng with...	Western Cape with...	KwaZulu Natal with...
TOTAL	4.35	0.69					
Explore							
Gauteng	4.40	0.57	0.667	0.687			
Western Cape	4.34	0.70			0.08		
KwaZulu Natal	4.31	0.84			0.10	0.03	
Other	4.29	0.69			0.15	0.06	0.02
TOTAL	4.36	0.66					
Experience							
Gauteng	4.22	0.66	0.721	0.795			
Western Cape	4.18	0.70			0.06		
KwaZulu Natal	4.31	0.84			0.11	0.16	
Other	4.21	0.71			0.01	0.05	0.12
TOTAL	4.22	0.70					
Engage							
Gauteng	4.52	0.51	0.677	0.681			
Western Cape	4.45	0.68			0.09		
KwaZulu Natal	4.46	0.77			0.07	0.01	
Other	4.57	0.46			0.10	0.17	0.13
TOTAL	4.50	0.58					
Exchange							
Gauteng	4.52	0.54	0.363				
Western Cape	4.43	0.72			0.13		
KwaZulu Natal	4.58	0.77		0.405	0.08	0.20	
Other	4.59	0.47			0.15	0.24	0.02
TOTAL	4.52	0.60					
Embrace							
Gauteng	4.42	0.56	0.260	0.339			
Western Cape	4.36	0.71			0.09		
KwaZulu Natal	4.54	0.71			0.18	0.27	
Other	4.50	0.50			0.14	0.20	0.07

					Effect Size		
Geographical location	Mean	Standard deviation	Anova p-values	Welch p-values	Gauteng with...	Western Cape with...	KwaZulu Natal with...
TOTAL	4.43	0.61					
Execute							
Gauteng	4.56	0.53	0.631	0.707			
Western Cape	4.46	0.66			0.14		
KwaZulu Natal	4.58	0.73			0.03	0.15	
Other	4.56	0.54			0.01	0.14	0.03
TOTAL	4.54	0.59					
Exit							
Gauteng	4.26	0.68	0.778	0.763			
Western Cape	4.22	0.67			0.06		
KwaZulu Natal	4.32	0.86			0.06	0.11	
Other	4.33	0.62			0.10	0.17	0.02
TOTAL	4.27	0.70					
Enhance							
Gauteng	4.23	0.63	0.831	0.874			
Western Cape	4.18	0.73			0.07		
KwaZulu Natal	4.28	0.78			0.07	0.14	
Other	4.24	0.64			0.01	0.08	0.06
TOTAL	4.23	0.67					
SECTION B							
Customer experience – customer engagement							
Gauteng	4.33	0.60	0.432	0.518			
Western Cape	4.19	0.75			0.18		
KwaZulu Natal	4.36	0.84			0.03	0.19	
Other	4.31	0.65			0.03	0.16	0.05
TOTAL	4.31	0.68					
Customer experience – customer satisfaction							
Gauteng	4.49	0.53	0.278	0.332			
Western Cape	4.38	0.71			0.15		
KwaZulu Natal	4.53	0.81			0.05	0.18	
Other	4.35	0.62			0.21	0.03	0.21

					Effect Size		
Geographical location	Mean	Standard deviation	Anova p-values	Welch p-values	Gauteng with...	Western Cape with...	KwaZulu Natal with...
TOTAL	4.46	0.63					
Customer engagement – customer intent (re-patronage)							
Gauteng	4.34	0.69	0.355	0.436			
Western Cape	4.24	0.70			0.14		
KwaZulu Natal	4.47	0.84			0.15	0.26	
Other	4.34	0.67			0.00	0.14	0.15
TOTAL	4.34	0.72					
Customer satisfaction – customer intent (re-patronage)							
Gauteng	4.49	0.61	0.891	0.910			
Western Cape	4.42	0.74			0.09		
KwaZulu Natal	4.48	0.84			0.01	0.07	
Other	4.49	0.55			0.00	0.09	0.01
TOTAL	4.48	0.67					
Customer experience – customer intent (re-patronage)							
Gauteng	4.47	0.53	0.645	0.690			
Western Cape	4.36	0.69			0.15		
KwaZulu Natal	4.47	0.83			0.00	0.13	
Other	4.46	0.65			0.01	0.14	0.01
TOTAL	4.45	0.63					

Geographical location in Section A and Section B of Table C.3 had effect sizes of 0.31 and below for all constructs. Considering the effect sizes there are no practically visible or practically significant differences reported for the analyses based on Geographical Location groups.

APPENDIX D: QUALITATIVE STUDY THEMATIC ANALYSIS

APPENDIX D.1 Analysis of Section A - Participant detail (Questions 3 to 6)

Question 3: “How long have you have worked in this position?”

Participant	Responses to Question 3	Categories
1	1	1 year – 6
2	10	2 years - 2
3	3	3 years - 2
4	10	5 years - 1
5	1	6 years - 1
6	10	7 years - 1
7	10	10 years - 4
8	7	
9	6	
10	2	
11	1	
12	5	
13	2	
14	1	
15	1	
16	1	
17	3	

Categories	Themes
1 year – 6	1- 3 years (10)
2 years – 2	4- 6 years (2)
3 years – 2	7 - 10 years (5)
5 years – 1	
6 years - 1	
7 years – 1	
10 years – 4	

Information revealed at the study's introductory meeting with all seventeen participants indicated that all participants had a minimum of ten-year retail operational and/or management experience before being appointed in their current positions at their current companies.

APPENDIX D.2 Question 4: “Please indicate how many stores (shops) you manage?”

Participant	Responses to Question 4	Categories
1	5	0 shops (4)
2	0	1 shop (4)
3	5	5 shops (9)
4	0	
5	0	
6	5	
7	5	
8	5	
9	1	
10	5	
11	5	
12	1	
13	5	
14	5	
15	0	
16	1	
17	1	

Categories	Themes
0 shops (4)	0 shops (4)
1 shop (4)	1 shop (4)
5 shops (9)	5 shops (9)

APPENDIX D.3 Question 5: “Please indicate in what regions (or metropolises) your stores are located?”

Participant	Responses to Question 5	Categories
1	I have 6 stores, mostly in the far West Rand & North-West	Gauteng (12)
2	Head Office: Customer Experience	All regions (2)
3	Pretoria	North-West (2)
4	Johannesburg, Pretoria, North-West and Mpumalanga	Mpumalanga (2)
5	All regions	West Rand (2)
6	Gauteng	
7	Gauteng	
8	Gauteng	
9	Gauteng	
10	All regions and stores	
11	Mpumalanga	
12	Gauteng	
13	Pretoria	
14	PTA - Gauteng	
15	Gauteng	
16	Gauteng	
17	West Rand (Roodepoort)	

Categories	Themes
Gauteng (12)	Gauteng (14)
All regions (2)	All regions (2)
North West (2)	North-West (2)
Mpumalanga (2)	Mpumalanga (2)
West Rand (2)	

APPENDIX D.4 Question 6: “What is your highest educational qualification?”

Participant	Responses to Question 6	Categories
1	Public Relations Diploma	Diploma (5)
2	MBL	Certificate (2)
3	Sport Management and Administration	Master's degree (1)
4	BAA (Basic Ambulance Assistant)	Honours degree (1)
5	Diploma	Bachelor's degree (3)
6	National Certificate in Information Technology	Post matric (2)
7	Bachelor of Commerce	Matric (2)
8	Diploma	No reply (1)
9	Post Matric	
10	Honors	
11	B Tech Business Administration	
12	Higher Certificate Unisa	
13	Bachelor's Degree	
14	Std 10	
15		
16	Diploma	
17	Matric	

Categories	Themes
Diploma (5)	Post matric (14)
Certificate (2)	Matric (2)
Master's degree (1)	No reply (1)
Honours degree (1)	
Bachelor's degree (3)	
Post matric (2)	
Matric (2)	
No reply (1)	

APPENDIX D.5 Analysis of Section B - Current retail store customer measurement and management model (Questions 7 to 12)

Section B of the interview guide consisted of six questions. Participants shared their views on their retail companies' application of formal Customer Experience Management (CEM) processes (Question 7), the elements associated with the processes (Question 8), the level of their company's most recent official customer experience scores (Question 9) and the level of customer experience in the SA retail industry (Question 10). The interview guide also elicited responses as to the existence of a possible mismatch between retail customer expectations and the level of service experienced at retail stores (Question 11) and the reasons for such a mismatch if it exists (Question 12).

APPENDIX D.5.1 Question 7: “Does your company have a formal customer experience management (CEM) process, or any other customer measurement and management process in place? If so, please identify and explain the process?”

Participant	Responses to Question 7	Themes	Contributory themes
1	NPS however the report is only released once a month	Confirmatory (15)	NPS (7)
2	Yes, full Voice of the Customer (VOC) and Management (VOM) capability with closed loop	Non-confirmatory (2)	Customer pledge (3)
3	Customer Service Pledge where agents are taking an oath of serving customers with excellence		VOC & VOM (1)
4	Yes, NPS (Net promoter score) customer service satisfaction survey established from questions related to customer service experience		Yes, but no mention (4)
5	Yes		No process (2)
6	The is a newly implemented Client service pledge that has been introduced.		
7	No CEM process in place		

Participant	Responses to Question 7	Themes	Contributory themes
8	We've just introduced the Customer Service pledge where everyone in the business supposed to manage the process and execute.		
9	NPS		
10	No		
11	Reliant on NPS information provided by Telkom		
12	Yes		
13	We have NPS where the customers rate their customer experience but no real Management of it and accurate measurement.		
14	Q man and NPS Ticketing system and customer service feedback on NPS		
15	Yes,		
16	Yes,		
17	NPS - Customer receives an SMS to rate service received from a store after agent interaction		

Sub-categories	Contributory themes
NPS (7)	Experience (8)
Customer pledge (3)	Pledge (3)
VOM & VOC (1)	

APPENDIX D.5.2 Question 8: “Please indicate the different elements of your CEM process, or the customer measurement and management process in use?”

Participant	Responses to Question 8	Categories
1	I cannot answer the above because there is no consistency in the report and its always faulty	No CEM elements observed or consistency in reporting (4)
2	Customer surveys based on customer journeys (Acquisition, Service & Use), key KPI's measured include Customer Effort Score (CES) and Quality of Service (QoS). Sentiment analysis used for root cause analysis and identification of improvement areas	Customer journey measurements (KPI's) (7)
3	There are no different elements to measure with	NPS customer ratings (4)
4	An SMS gets sent out to the customers once they have completed their service with an agent, the feedback is then complied (positive and negative) on a spread sheet and sent through to HQ to distribute to the Area mangers to address with their team and call the customers with the negative reviews to assist.	No response (4)
5		Queue management KPI's (2)
6	None that I know of apart from Qman stats.	
7	No CEM process in place	
8	It consists of agents interaction with customer and customer experience during and after sales	
9		
10	At the moment, we're informally tracking and receiving feedback, sometimes during	

Participant	Responses to Question 8	Categories
	scrums, KPI's and discussions for continuous customer improvement.	
11	Kept informed, Agent helpfulness, Agent knowledge, Agent professionalism, Availability of stock, Service as expected, Service as needed, Turnaround time, Variety	
12	NPS	
13	The NPS customer rating I mentioned in the previous question does not go into detail.	
14	It consists of Qman ticketing system for service required - Customer waiting time and NPS for customer service survey feedback and measure customer interaction.	
15	NPS and customer service pledge	
16		
17		

Categories	Themes
No CEM elements/inconsistency (4)	Journey KPI's (13)
Customer journey measurements (KPI's) (7)	No consistency (4)
NPS (4)	No response (4)
No response (4)	
Queue management (2)	

APPENDIX D.5.3 Question 9a: “Please indicate and describe the level of the most recent official customer experience or customer measurement score for your company’s retail stores?”.

Participant	Responses to Question 9a	Categories
1	Very Poor	Excellent (1)
2	Good	Very good (3)
3	Good	Good (7)
4	Very Good	Poor (3)
5	Poor	Very poor (2)
6	Very Good	
7	Poor	
8	Good	
9	Very Good	
10	Good	
11	Good	
12	Excellent	
13	Very Poor	
14	Poor	
15	Good	
16	Good	
17		

Categories	Themes
Excellent (1)	Good (11)
Very good (3)	Poor (5)
Good (7)	
Poor (3)	
Very poor (2)	

APPENDIX D.5.4 Question 9b: “Please explain the reason for the rating?”

Participant	Responses to Question 9b	Categories
1	The information is inconsistent and unreliable.	Good Staff service (8)
2	Compared to previous year performance has decreased	High scores (1)
3	The customer managed to understand the nature of the problem even though they were not entirely happy	Good products (1)
4	Bluetech scored an overall score of 82% on the latest report	Poor staff service (4)
5	No assistance from the floor staff	Poor store atmospherics lacking (1)
6	Customer wrote a complement for the service rendered by one of our Sales agents and she went to say that this was best service she ever received.	Poor sales catalogue, stock (1)
7	our agents are not trained specifically on Customer Care	Poor network (1)
8	I still feel it's good, acceptable but we can do better in ensuring that we give exceptionally service all the time	CE information inconsistent & unreliable (1)
9	Because customers were happy with the overall in store experience.	
10	The customer was satisfied with their product (feedback from a store)	
11	In most cases customers rated the service as easy or extremely easy	
12	I always remind the guys every morning that customers are our employers as they pay our salaries, we need to always treat them like King and Queens	
13	Overall, the brand has bad customer experience from the look and feel of the logo, stores, catalogue, and agent etiquette.	

Participant	Responses to Question 9b	Categories
14	82% witch is not good we need to be on 95% to 100% -Reason, network problems - long waiting times - stock issues - agent knowledge .	
15	They assist customers to the best of their knowledge.	
16	Our agent goes through a certain training	
17		

Categories	Themes
Good Staff service (8)	Good - staff and products (10)
High scores (1)	Poor - staff and logistics (8)
Good products (1)	
Poor staff service (4)	
Poor store atmospherics lacking (1)	
Poor sales catalogue, stock (1)	
Poor network (1)	
CE information inconsistent & unreliable (1)	

APPENDIX D.5.5 Question 10a: “Based on your experience, how would you describe the level of customer experience in the SA retail industry?”

Participant	Responses to Question 10a	Categories
1	Good	Good (5)
2	Poor	Poor (11)
3	Poor	Very poor (1)
4	Poor	
5	Good	
6	Good	
7	Poor	
8	Good	
9	Good	
10	Poor	
11	Poor	
12	Poor	
13	Very Poor	
14	Poor	
15	Poor	
16	Poor	
17	Poor	

Categories	Themes
Good (5)	Good (5)
Poor (11)	Poor (12)
Very poor (1)	

APPENDIX D.5.6 Question 10b: “Please explain the reason for your rating?”

Participant	Responses to Question 10b	Categories
1	Not all companies are consistent with customer service experience. It would be great if everybody took Customer Service seriously.	Staff training, motivation, attitude & accountability (10)
2	No focus on customers' expectations and requirements; poor experience throughout the store including flow of traffic, availability of stock and attitude of staff	Service consistency (5)
3	Some policies are not clearly explained to the customer prior signing a contract. If these policies are explained, they are usually in fine print to the naked eye	Customer expectations (2)
4	Agents in most stores have a target, after COVID there are less customers that are in a position to spend money, so agents push through the ques to get as many sales as they can instead of investing their full time and attention to every customer that could be a potential sale, a query today could be a sale tomorrow is one thing I drove with my team. This goes hand in hand with good reviews from customers with word of mouth if the query doesn't end up being a sale.	Product (2)
5	Not all employees are putting in an effort to provide the best customer service. it's all about the salary more than getting the job done.	Implementation (1)
6	Overall good customer experience in South Africa is not a norm there are exceptions here and there.	Government institution (1)
7	Service in the Retail industry is non-existent /Companies don't invest in it	
8	With over 20 years retail experience I've seen a decline in customer service due to changing business traits and poor implementation of some customer service ideas.	

Participant	Responses to Question 10b	Categories
9	Customers and staff in retail - I don't think are too passionate about customer service.	
10	8 out of 10 times I'm dissatisfied with the experience due to either service or product quality.	
11	Don't care attitude , no after sales service or follow up, front end staff with are not focused on the customer they are serving but rather chatting to other workers , lack of knowledge , slow service	
12	Staff need to understand why we need to always give our best when servicing our customers and this must be in their hearts, they must feel it and do it	
13	The SA retail customer service is careless they do the bare minimal to acknowledge and serve the customer. There is no real kind engagement and when there is mostly because it's initiated by the customer when this should be the opposite. Every here is on defence mode.	
14	No accountability	
15	Not all of them are poor ratings but the service delivery is not outstanding. Cashiers in retail supermarkets feel as if we owe them something as customers. In some retail stores you pack for your own groceries whilst there are cashiers and till packers instore.	
16	Government institution	
17	There is lack of consistency in the quality of service rendered. It somewhat subjective to appearance, race, and gender	

Categories	Themes
Staff (10)	Staff (10)
Service consistency (5)	Consistency (11)
Customer expectations (2)	
Products (2)	
Implementation (1)	
Government institution (1)	

APPENDIX D.5.7 Question 11: “Do you believe a mismatch exists in the retail industry between customer expectations and the level of service being experienced at retail stores?”

Participant	Responses to Question 11	Categories
1	Maybe	Yes (13)
2	Yes	Maybe (2)
3	Yes	No (2)
4	Yes	
5	No	
6	Yes	
7	Yes	
8	Yes	
9	Yes	
10	Yes	
11	Yes	
12	Yes	
13	Maybe	
14	Yes	
15	Yes	
16	No	
17	Yes	

Categories	Themes
Yes (13)	Confirmers
Maybe (2)	Indecisive
No (2)	Non-confirmers

APPENDIX D.5.8 Question 12: “If a mismatch exists, to what do you ascribe the mismatch? Please explain”

Participant	Responses to Question 12	Categories
1	Staff do not understand that in order to increase revenue they have to delight customers; in some industries customers don't have a choice like food and medicine – they have to buy to survive	Business acumen
2	Some other retailers are taking customer service to the highest level	Management
3	Customers go to a store and assume that the agents are able to assist with anything they might need done, forgetting that there are escalation paths and turnaround times allocated to these processes and this is enough to discourage a customer and make them irate because they might have to return to the store or wait longer for resolution, so it is very important for agents to be confident and clear in explaining the process and the reason for the possible delay to try and avoid these situations from leaving a bad customer service experience.	Staff able to assist Staff confidence Customer education
4	No response offered	
5	Most retail staff don't exercise exceeding expectation.	Staff training Appraisal
6	Failure by staff to take ownership of their customers, they don't see customers as people who bring in their revenues	Staff no ownership Business acumen
7	In many instances customer expectations are not meet due to lack of customer service as well as lack of product knowledge from the agents	Customer service Product knowledge
8	Retail staff seem to be OK in giving customers the bare minimum and customer are getting used to expecting and accepting it.	Staff motivation Appraisals
9	Amongst other socio-economic and geographical factors, global economic crisis's & Inflation could indirectly be influencing sales- not only down the supply chain of production but also on a	Staff motivation

Participant	Responses to Question 12	Categories
	psychological level. I believe this sub -consciously influences the level of enthusiasm/ motivation behind interactions, selling and connecting with the customer on a personal level (financial pressure to achieve targets faster= low morale). This was especially evident to be during and after the Covid-19 Lockdown period.	
10	Lack of loyalty toward companies by retail staff at the coal face. Retail workers are undervalued by their employees, remuneration is extremely low and there is no trust between the worker/employee and vice versa, thus it is difficult to motivate the correct behaviour	Staff loyalty Staff undervalued Trust
11	Staff must know that they are there to help customers	Objectives
12	The gap exists because the management's perception of customer expectations is different from actual customer expectations.	Management
13	I think over all customers' expectations are too high and customers are not well informed.	Customer education
14	As a customer you expect to be treated with respect and as first priority in any retail environment. receive assistance where applicable and leave the store with references in place already because you were happy about the service delivery. These days, Retail employees feels as if customers owe them the world and they are disrespectful.	Staff respect
15	No response offered	
16	Chasing profits	Management
17	No response offered	

Categories	Themes
Business acumen	Training (10) Goalsetting (3) Management (3) Business acumen (3) Trust (3)
Management	
Staff assistance	
Customer education	
Staff confidence	
Staff training	
Appraisal	
Staff ownership	
Business acumen	
Customer service	
Product knowledge	
Staff motivation	
Appraisals	
Staff motivation	
Staff loyalty	
Staff undervalued	
Trust	
Objectives	
Management	
Customer education	
Staff respect	
Management	

Question 12: Consolidated theme

Themes	Consolidated theme
Training (10)	Leadership
Goalsetting (3)	
Management (3)	
Business acumen (3)	
Trust (3)	

APPENDIX E: ANALYSIS OF SECTION C: PROPOSED RETAIL STORE CUSTOMER EXPERIENCE MANAGEMENT MODEL DRIVERS (QUESTIONS 13 TO 15)

Section C focused primarily on the 12E constructs included in the proposed customer centric experience management framework model.

APPENDIX E.1 Question 13: “What is your understanding of the concept of customer experience?”.

Participant	Responses to Question 13	Categories
1	is all the interactions customers have with your company at all stages of the customer Authentic journey—even if it doesn't result in a purchase. It focuses on the relationship between a business and its customers	Authentic journey
2	CX drives advocacy, which again drives churn and recommendation and results in revenue	Churn Referral Revenue
3	What the customer has gone through from entering the door, interaction with the agent and leaving the store	Authentic journey
4	Customer service starts from the time the customer enters the store (look and feel) friendly confident faces to the level of service and professionalism given to every customer making them want to return to the store.	Authentic journey Atmospherics Staff Retention
5	Customer should get the best service as they bring in revenue to the business.	Revenue
6	Going the extra mile to obtain customer satisfaction and maintaining customer centricity.	Retention

Participant	Responses to Question 13	Categories
7	The customers feeling after he/she has interacted with employees of an organisation	Authentic journey
8	It's the service from when the customer start thinking about buying, choosing a specific product and place to go buy, contacting or visiting the business, interaction, sales process, after sales and feedback thereafter.	Authentic journey
9	Giving customers more than they expect at all levels.	Expectations
10	The quality of a customer's Authentic journey as a whole from the first interaction right until the end, including after the customer uses the product or receives the service.	Authentic journey
11	It is the interaction between a customer and an organisation through the customer Authentic journey, so although a customer may receive excellent service at point of sale , it can all be ruined later if for example a delivery is delayed , a bill is invoiced incorrectly etc.	Authentic journey
12	Expectations	Expectations
13	The concept of customer experience is the impression customers get of our brand as a whole from every interaction they have with Telkom from the call center to the look and feel of the shopping bag they receive.	Authentic journey
14	Discover then engage then delivery	Authentic journey
15	Great customer service means following best practices like valuing customers' time, having a pleasant attitude, and providing knowledgeable and resourceful resources, but that you also take things a step further	Authentic journey Expectations

Participant	Responses to Question 13	Categories
	to exceed rather than just meet expectations.	
16	Customer service	Authentic journey
17	It's the Authentic journey through the customer interact with the business/company	Authentic journey

Categories	Themes
Authentic journey (12)	Journey (14)
Churn (1)	Revenue (6)
Referral (1)	Expectations (3)
Revenue (2)	
Retention (2)	
Expectations (3)	
Atmospherics (1)	
Staff (1)	

APPENDIX E.2 Question 14: “What do you perceive to be the drivers for consistent high customer experience ratings?”.

Participant	Responses to Question 14	Categories
1	Product knowledge, creative thinking, active listening, maintain a positive attitude	Staff skills
2	Clear vision, motivated staff, high performance culture	Staff skills
3	Approachable smiling face that shows that the customer is welcome	Staff skills
4	a store that has friendly, confident, and knowledgeable staff	Staff skills
5	Respect and checking on the customer needs.	Staff skills
6	customer analysis, customer relationship.	Strategy
7	Consistency, going above and beyond, commitment, service delivery. seamless service from various "departments" within companies	Strategy Processes
8	Environment, product knowledge, communication, sales process, feedback	Atmospherics Processes
9	Passion, commitment and a high-level of expectation	Staff
10	extrinsic motivators (quick "wins") that are motivated by intrinsic values (more long-term and purpose related/ driven)	Strategy
11	Quality and consistency, customer focused business processes and staff with a buy in and vested interest in meeting the customer's needs	Processes Staff
12	To engagement with customers	Staff
13	The drivers for consistent high customer experience ratings are the personal connection made with each customer, and making the customer feel important by	Staff

Participant	Responses to Question 14	Categories
	showing CARE (we will take care of them and provide a solution to the problem).	
14	look feel -marketing elements- time, having a pleasant attitude, and providing knowledgeable and resourceful resources.	Atmospherics Staff
15	Listening, understanding your customer's needs, thanking the customer, and promoting a positive, helpful, and friendly environment will ensure they leave with a great impression.	Staff Atmospherics
16	Honesty	Staff
17	Communication, building relationship, Empathy and Adaptability to change	Staff

Categories	Emergenced themes
Staff skills (13)	Staff skills (13)
Atmospheric environment (3)	Strategy (9)
Business processes (3)	
Strategy (3)	

APPENDIX E.3 Question 15.1a: “To what extent do you feel that determining and executing customer need-and-want expectations can impact customer experiences? Please explain”

Participant	Responses to Question 15.1a	Categories
1	Very high because customer needs and wants are the main influencer of the experience	Profiling Authentic journey design
2	Customer profiling (needs, requirements, behaviours, etc.) results in better Authentic journey design that results in CX	Profiling Authentic journey
3	Media is one part that drives the customer to have keenness in dealing with us, therefore what is being advertised needs to be clearly outlined better than the advert.	Media
4	you need to know what the customer is asking for in order to assist the customer efficiently and accurately. This will then result in a good customer experience.	Profiling
5	When the customer does not get what they want or get the best effort service	Profiling
6	The unpromoted and promoted approach is crucial to determine the needs and wants of the customer. to ensure satisfaction expectations must be met timeously.	Profiling
7	its extremely crucial to know your customer and be aware of his/her needs	Profiling
8	Product knowledge, keeping in constant contact with the customer for feedback, going an extra mile	Product knowledge
9	To a great extent because that will form part of their lasting memory, depending on if its positive or negative.	Authentic journey
10	It provides the customer with a unique, context- specific and "tailored" experience as opposed to a tele-sales/ marketing /"one size fits all" experience. If	Authentic journey

Participant	Responses to Question 15.1a	Categories
	incorporated in every step of the process, i.e., the agent's tone of voice, mannerisms and choice of vocabulary that is tailored to relate to the customer's level of understanding and frame of reference, it can have a lasting impression.	
11	High - by determining what the customer needs and wants prevents come backs, after sales queries etc.	Profiling
12	You need to know what customers are looking for so you can exactly the service they want	Profiling
13	Simple because they affect the Brands reputation as a whole. When customers have high expectations of the Telkom brand and services, they also have a positive view of the Brand as a whole.	Brand
14	It is highly essential for delivering excellent customer service.	Authentic journey
15	Product knowledge, keeping in constant contact with the customer for feedback, going an extra mile	Product knowledge
16	Generally, customer expectations are a set of ideas about a product, service, or a brand that a customer holds in their mind. For example, customers that buy an Apple iPhone over another phone brand have a set of expectations about that product.	Product knowledge
17	You are able to provide solutions easily which will result in your services being efficient.	Product knowledge

Categories	Themes
Profiling (8)	Profiling (12)
Authentic journey (5)	Journey (7)
Product knowledge (4)	
Brand (1)	
Media (1)	

APPENDIX E.4 Question 15.1b: “Explain briefly what retail orientated tactics can be developed and implemented to determine, evaluate, and execute customer need-and-want expectations?”

Participant	Responses to Question 15.1b	Categories
1	Reflect on our service, observe staff behaviour, gather data from customers.	Data collection
2	Customer behaviour and shopping patterns can be derived from different data points including loyalty cards to ensure targeted campaigns and service delivery	Data collection
3	Attentive listening to the customer and making sure that the customer needs are fully addressed.	Data collection
4	product and system training is critical as well as understanding the product and systems, regular refreshers and performance reviews must be done to ensure the agent is still able to perform his duties as per the companies' provided policies and procedures and KPA.	Training
5	Training should constantly be put in place	Training
6	Time management, customer centricity and needs analysis.	Needs analysis
7	Proper programs in place to orchestrate great customer service	Service programs
8	Going extra mile, product knowledge, communication, giving value for money to customers	Training
9	Feedback in store, by phone or SMS - After sales correspondence. Suggestions and recommendations	Data collection
10	Customer Profiling, Feedback Forms, evaluating and discussing the feedback and implementing this feedback in applicable areas on a continuous basis.	Data collection
11	Interactive tools that enable customers to compare deals, benefits, costs etc. Flexible	Interactive tools Data collection

Participant	Responses to Question 15.1b	Categories
	offerings bundled deals to suit lifestyle and budget. Consistent communication that is clear and unambiguous. After sales follow ups to evaluate service.	
12	Constant staff training and daily scrums	Training
13	We can start with service from the heart, accurate short customer ratings, and customer service auditing. The stores need a complete new fresh inviting look and branding logo redesigned.	Data collection
14	Needs analysis.	Needs analysis
15	The key way to anticipate is via a thorough analysis of the needs and wants of customers.	Needs analysis
16	Needs analysis	Needs analysis
17	Get feedback from customers from their experience of using your products and what can you improve to make them better	Data collection

Categories	Themes
Data collection (8)	Needs (14)
Customer needs analysis (4)	Staff (4)
Interactive shopping mechanisms (1)	
Service programs (1)	
Staff training (4)	

APPENDIX E.5 Question 15.2a: “To what an extent do you feel that exposure to physical in-store evidence of adherence, or not, to customer experience expectations, can have an impact on customer?”

Participant	Responses to Question 15.2a	Categories
1	The main reason consumers prefer to shop in physical stores is to see, experience, and test products in person before buying. A physical experience can dispel doubts and help close the sale. This can reduce the chance of a product being returned	Trust
2	If not complied to, it can result in even more customer frustration and more irate customers	Trust
3	In most instances the live demo units are an integral part of making the customer have a feeling of the device they are interested in	Product
4	Showing the customer physical evidence related to the service the customer came to the store for, it will substantially show that what the agent is explaining is in fact correct based on physical evidence.	Trust
5	The store should be presentable as well as the staff, cleanliness should be the top priority	Store Staff
6	very crucial customer love interaction and someone they can refer to.	Staff
7	it is very crucial that a customer is exposed to the process his order will undergo to get his order implemented, in this way he would be more accepting of our timelines	Processes
8	Greeting the customer with a smile, making sure the customer is important by acknowledging their presence and giving good service	Staff
9	This will eliminate surprises and anxiety around what to expect at what point. Seamless experience	Processes
10	In my experience, customers enjoy seeing real-life human experiences showcasing practical	Technology applications

Participant	Responses to Question 15.2a	Categories
	and economical improvements that were made on realistic, everyday problems because it's something they can relate to. Not artificial 3D, animated posters with unrealistic looking ideals. Interviewing satisfied customers on a screen (green screen or animated background , in- store right after their experience can be a fun and realistic way to attract new customers, especially the younger generation. It also combines AI and Technological innovations with realism (screen combined with interview)	
11	High - many customers would like to feel and experience a product before deciding to purchase	Product
12	Staff need to always willing to assist	Staff
13	Physical in-store evidence has a significant impact on customer experience assessments. When a store meets or exceeds customer expectations in terms of cleanliness, organisation, and helpful staff , it leaves a positive impression. This enhances the overall experience and builds trust . Conversely, failing to meet these expectations can lead to a negative experience and deter customers. In-store evidence shapes perceptions and influences customers' assessments, so creating a physical environment that aligns with expectations is crucial for fostering positive experiences.	Store Staff Trust
14	will increases long-term customer value.	Trust
15	Greeting the customer with a smile, acknowledging their presence, and giving good service.	Staff
16		
17	It builds trust or lack thereof	Trust

Categories	Themes
Trust (6)	Trust (12)
Staff (6)	Merchandising (5)
Store (2)	Atmospherics (2)
Product (2)	
Process (2)	
Technology (1)	

APPENDIX E.6 Question 15.2b: “Explain briefly what retail orientated tactics can be developed and implemented to expose customers to physical evidence at pre-purchase, purchase, and post-purchase stages, showing that retailers execute on customer experience expectations”

Participant	Responses to Question 15.2b	Categories
1	Offer valuable and proper content, ask customers for feedback, create loyalty programs.	Merchandising Programs
2	Physical evidence should be the store cleanliness, friendliness of staff, no long queues in the store, etc.	Store Staff Journey
3	The different live demo units for a customer to experience the different advantages and disadvantages of what they are interested in	Merchandising
4	Sticking to policies and procedures set out by the business will ensure the agent know what must be done in every situation, all queries should be started by dissecting the customer's request and from there the proof is needed being either an invoice, statement or contract etc falling back to the agents knowledge on obtaining these documents by being fully trained on what documents would be needed and where to get these documents that agents are able to access.	Staff training
5	Agents should be trained more on customer service and should be upskilled on working with customer.	Staff training
6	merchandising good communication with customers and providing good after sale support.	Merchandising Staff support
7	retail staff must be trained to handle objections and explain to customers their value and set their expectations	Staff training
8	Keeping in contact with the client, understanding customer needs, listening skills and being able	Staff skills

Participant	Responses to Question 15.2b	Categories
	to execute the sale, feedback, after sales contact for referral.	
9	A step-by-step card summarizing the purchase Authentic journey - What, who, when and how.	Journey
10	Live proof of comparisons made between visions, purchase, and feedback.	Merchandising
11	Live demo devices, gaming areas, tech areas etc	Merchandising Store
12	Engagement before sale and after sale service	Journey
13	Retail-oriented tactics such as attractive window displays, well-trained staff, interactive product demonstrations, transparent pricing, seamless payment options, personalized follow-up, and loyalty programs can expose customers to physical evidence at pre-purchase, purchase, and post-purchase stages, showcasing retailers' commitment to executing on customer experience expectations.	Staff Merchandising Journey Programs
14	Tangible proof that establishes credibility and includes the look and feel of your product	Merchandising
15	Live Demos	Merchandising
16	Practical Customer Orientation Tactics You Can Implement Today If you want your retail business to be a success	Merchandising
17	In store demonstrations	Merchandising

Categories	Themes
Merchandising (10)	Merchandising (10)
Staff (7)	Staff (7)
Journey (4)	Atmospherics (8)
Store (2)	
Programs (2)	

APPENDIX E.7 Question 15.3a: “To what extent do you feel that retail customers want to experience exciting, pleasant, and rewarding retail experiences and what impact does this, or the lack thereof, have on customer experience assessments? Please explain”

Participant	Responses to Question 15.3a	Categories
1	Exciting layout draws customers to a store, a variety of product offerings allow customers an opportunity to choose, price is also an important factor to draw customers and influence decisions.	Store Product & price
2	Customers want to have physical evidence that they matter to the retailer – whether it is friendly & polite staff or personalised messaging and offers	Staff Valued
3	Pricing and product availability especially when it is a promotional item	Product & price
4	The more inviting a stores look, and feel is from a customer's point of view creates curiosity and a need for more information, If a store seems organized from the moment you enter that immediately creates a positive feeling and professional organized service expectation.	Store
5	Customer always wants to feel special and appreciated. Giving out freebees or having discounts on certain days and also ensuring that they get all the products they need.	Valued
6	The highest extent customers want to feel valued	Valued Staff
7	customers look forward to having a heartwarming experience when they visit any retail outlet. they look forward to a wow experience. Treated like the only customer.	Valued Staff
8	Brochures showing value for money, advertising exciting deals, contacting customers either via email, calls and offering exciting deals,	Brochures

Participant	Responses to Question 15.3a	Categories
9	this will keep customers interested and eager to see, touch, feel and experience. It will enhance frequent visits if the experience is positive.	Merchandising
10	As mentioned previously, I would think that incorporating "relatable" and "human" experiences to advertisements that are driven by AI could make a difference to younger and older customers (children's drawings of their first cellular device animated and played in the back of the store)	Support ads Technology
11	High - a dull empty space can put people off	Merchandising
12	To have live devices or dummy to show customers before they buy is assisting a lot	Products
13	Retail customers greatly desire exciting, pleasant, and rewarding experiences. The impact of meeting these expectations is positive customer experience assessments, loyalty, and recommendations . Failing to deliver on these desires can result in dissatisfaction, negative word-of-mouth, and decreased loyalty. Thus, fulfilling customer expectations for engaging retail experiences is vital for business success.	Valued Staff
14	Exciting customer experience leaves people feeling heard and appreciated . It minimizes friction, maximizes efficiency, and maintains a human element.	Valued Staff
15	Pricing and product availability on promotional deals	Products & price
16		
17	Customers are more swayed by items they can feel and touch- Marketing	Products

Categories	Themes
Atmospherics (2)	Value perceptions (18)
Merchandising (7)	Staff (5)
Value perceptions (6)	
Staff (5)	
Advertising (2)	
Technology (1)	

APPENDIX E.8 Question 15.3b: “Explain briefly what retail orientated tactics can be developed and implemented to excite customers and positively impact customer experience assessments.”

Participant	Responses to Question 15.3b	Categories
1	Create engaging content , advertise a lot on social media , get involved with a community	Social media
2	As per the above – things that make customers feel that the company cares about their well-being and put them first	Customer focus
3	Fast and efficient service . The customer can choose to the competition but when the service is expedited and satisfactory, they will come back or tell others	Staff
4	Staff that always greet with a friendly smile no matter if the customer is there for a sale or a query. a clean store leaves the sense of an organized and well managed team that takes pride in what they do.	Staff Atmospherics
5	Constant promotions should be in place.	Merchandising
6	survey most definitely and birthday messages fathers and Mother's Day messages for those mom and dads	Customer focus
7	keep customer informed, clear, and concise explanation iro billing, delivery, knowledgeable agents in stores, build repour with customer explain benefits of different products	Customer focus
8	Brochures showing value for money, advertising exciting deals, contacting customers either via email, calls and offering exciting deals,	Merchandising
9	Have a dedicated floor walker/customer relations agent/ in store host. Someone to walk the customer through the store - Q&A and info sharing about specials and	Staff

Participant	Responses to Question 15.3b	Categories
	promotions. Separate from the actual selling person/order processor.	
10	involving customers in bigger projects that will reward them intrinsically and beyond the product or service they are purchasing, building relationships with the customers that will outlast the product.	Customer focus
11	as above	
12	Staff training	Staff
13	To excite customers and positively impact their experience assessments, retailers can create visually appealing stores, offer interactive experiences, provide personalized customer service, offer unique products, organize engaging events, provide convenient omnichannel experiences, and use technology for enhanced shopping (like improving mobile apps for easy browsing and personalized recommendations). These tactics aim to exceed expectations, increase satisfaction, and foster loyalty.	Atmospherics Merchandising
14	Understand customer needs, ask for customer feedback, set, and communicate clear service standards, Capture and share examples of great service.	Staff
15	Create engaging content especially on platforms like TikTok, Instagram and Twitter.	Social media
16	Customer orientation is a business approach in which an organisation solves for the customer first. It's all about focusing on helping customers meet their goals. Essentially, the needs and wants of the customer are valued over the needs of the business. For customer service, this	Staff

Participant	Responses to Question 15.3b	Categories
	means your support team is focused on meeting customer needs.	
17	Excite customers with latest trends	Merchandising

Categories	Themes
Social media (2)	Staff (6)
Customer focus (4)	Social media (6)
Staff (6)	Atmospherics (2)
Atmospherics (2)	
Merchandising (4)	

APPENDIX E.9 Question 15.4a: “To what extent do you feel that the reception at a retail store (ease of entry, welcoming and courteous) can influence customer experience assessments? Please explain.”

Participant	Responses to Question 15.4a	Categories
1	First impressions last therefore when a customer walks in the store, the reception from staff is the deciding factor whether to stay or leave	First impression Staff
2	Depending on the establishment it would vary, i.e. for complex or technical retail environments customers deems assistance very important but food shopping not	Staff
3	Welcoming face that says I'm here to help you. Letting the customer explain what they need and not always interjecting while the customer explain	Staff
4	Having someone at the door to meet and greet the customers plays a big role here and elevates customers from standing in a que unnecessarily if the store is not able to assist or if the customer has not got all requirements needed to assist with the customer's needs.	Staff
5	A warm welcome always leads to a sale. The customer obviously decide if they will be buying or not by looking at the business Logo and the staff from outside.	Warm welcome Staff
6	Very crucial, that's when you make the customer feel at home first impressions lasts.	Staff First impression
7	first impressions are the lasting impression. The way a customer is received is very crucial to his ultimate experience. The welcome sets the tone that the customer is really valued	First impression Staff
8	Warm welcome with a smile and making sure you direct the customer to the department would ensure that they feel at home.	Warm welcome

Participant	Responses to Question 15.4a	Categories
	Acknowledging their presence while awaiting service	
9	This makes the MOST impression and if not done correctly diminishes the TOTAL experience. First impressions last.	First impressions
10	First impressions are lasting and can make or break a sale. The sale alone is not going to set the tone of the overall experience/ Authentic journey	First impressions
11	Important - make the customer feel wanted and valued	Tone setting
12	They must be very welcoming	Tone setting
13	The reception at a retail store, including ease of entry and a welcoming and courteous atmosphere, can have a significant impact on customer experience assessments. It sets the tone for the entire shopping experience, making customers feel valued and appreciated, which positively influences their perception of the store and their overall satisfaction.	Ease of entry Staff
14	Listening, offer proactive solutions and let the customers have a voice.	Staff
15	Having someone at the door to meet and greet the customers and also being assisted with agents who are friendly and understand what customer expectations and experience is.	Staffing entrance
16	As we all know, you never get a second chance to make the first impression, so you need to make the first-time count.	First time count
17	Reception is the most important to the customer experience Authentic journey as it sets an expectation for the customer through their store visit	Reception Authentic journey

Categories	Themes
First impression	Staff (13)
Sets the tone	Tone setting (14)
Immediate assistance	
Staff interpersonal skills and welcoming demeanour (13)	

APPENDIX E.10 Question 15.4b: “Explain briefly what retail orientated tactics can be developed and implemented to improve the store entry experience of customers.”

Participant	Responses to Question 15.4b	Categories
1	Each staff member must be a friend/ associate to customers, greet customers with a smile and charisma. Show customers that we are interested.	Staff welcome
2	A host at the door is critical to greet the customer and welcome customers. As above more complex sales require a stoer assistant to advice the customer and guide them through their purchase	Staff welcome
3	Greeting the customer with a smile that says we are happy that you chose us, and we will make sure that you leave a happy customer	Staff welcome
4	Neat, organized space displaying all the latest eye-catching deals, and a Friendly face to greet and welcome them to the store.	Merchandising Staff welcome
5	Staff should have Name Tag, provided with uniform constantly and always make sure training is provided on customer experience.	Name tags Staff training
6	Customer service consultants are very important to welcome customers and be able to hear their views.	Staff welcome
7	A host to welcome customers and guide them through the store, offer customers opportunity to sit whilst they wait, in store info on our products and services on Media Players i.e. TV	Host Technology
8	Knowledgeable friendly individual at entrance who would greet the customer with smile. Systems which are easy for customer to use and understand, Qman, click to call.	Staff welcome Technology
9	Host, Q&A agent, promotions, and specials agent.	Host Merchandising
10	AI recognition systems that greet and welcome returning and first- time customers, having the	Technology

Participant	Responses to Question 15.4b	Categories
	best solutions/ devices right at the entrance of the store or encouraging customers to interact with the latest and most interesting apps or functions of the specific device before deciding.	
11	Hosts should be equipped with tablets to capture customer details to be queued for service. Customers should have an option to book an appointment time	Hosts Technology
12	Each store to have a host	Host
13	To improve the store entry experience for customers, retailers can implement several retail-oriented tactics. These include maintaining clear and unobstructed entrances, open doors, providing well-placed signage and directions for different store sections, creating an inviting and aesthetically pleasing storefront with less bulky tables making the area feel bigger.	Atmospherics
14	Make it simple for them to find what they want, provide a convenient returns policy, provide a range of payment methods. The store must be pleasing to the eye.	Atmospherics
15		
16	Have a good product and be persistent.	Merchandise
17	Get trained and qualified customer service agents	Staff trained

Categories	Themes
Staff welcome (6)	Staff (11)
Merchandising (3)	Entrance atmospherics (5)
Staffing – host (4)	Technology (4)
Technology atmospherics (2)	
Technology (4)	
Name tags (1)	

APPENDIX E.11 Question 15.5a: “To what extent do you feel that customers who freely explore a store and its merchandise within an ergonomically well planned, clearly signed, specified, and structured layout can influence customer experience assessments? Please explain.”

Participant	Responses to Question 15.5a	Categories
1	When the store is fully merchandised it allows a customer an opportunity to do eye shopping, touch and feel before they decide. This improves experience.	Merchandising Sensorial
2	Cluttered, over stocked stores with limited signage result in customers having to search for items leading to frustration and irritation	Merchandising
3	The structure in which the merchandise is packed should be appealing and attractive to the eye for the customer to have interest in purchasing	Merchandising Sensorial
4	a customer that is provided with many options e.g. accessories or devices that enters a store unsure of what they should take, should not feel limited or not granted the options to view and decide on with the assistance of the agent that has the knowledge of the stock to answer and assure the customer that he is making the correct selection.	Products Staff Sensorial
5	All above mentioned will make the customer feel at home and at ease to point where they don't mind spending as they can see that the management always meet their expectations.	Atmospherics Sensorial
6	branding is also very important hence the Telkom way of merchandising as per planogram is very crucial.	Merchandising
7	customers want that touch and feel experiences before they make a purchase. Sales Agents must be able to answer any possible questions relating to products and services	Sensorial Staff

Participant	Responses to Question 15.5a	Categories
8	Having demos for customer to use, accessories to feel, touch and try. Not too cluttered store. safe and secure environment for them.	Demos Sensorial Store layout
9	This makes a difference in that the customer can at least touch and feel which will promote sales and the touch/feel will forever be on the customer's mind and they will in turn sign up.	Merchandising Sensorial
10	If the layout is open and the colours are calming, an inviting store layout and atmosphere will be more inviting and encourage customers to stay longer. There is nothing worse than extremely bright LED lighting and loud music when you're enquiring on a product.	Store layout Sensorial
11	Not applicable to types of retail - when browsing for off the shelf goods, important, if you have to see a sales consultant, my view is it is not so critical - I just want to get in and get out	Staff
12	Yes if everything is there then customers can just sign up and leave	Merchandising
13	I think that customers who can freely explore a store with a well-planned layout, clear signage, and organized structure are more likely to have a positive experience. When customers can easily find what they need and navigate the store without hassle, it leads to greater satisfaction and positive assessments of their shopping experience. Like the Apple Stores.	Store layout Atmospherics
14	I totally feel we have to allow customers to wander around the store as they like and promotes impulse purchases. We can control the flow of traffic using signage.	Atmospherics Sensorial
15	Staff should have Full uniform constantly and should be trained on is customer experience. Roles plays during trainings can also boost the agents confidence.	Staff

Participant	Responses to Question 15.5a	Categories
16		
17	It allows customer to freely navigate through the store without always asking for assistance. it also promotes the home and safety feeling for the customers	Atmospherics

Categories	Themes
Merchandising (6)	Atmospherics (13)
Atmospherics (4)	Sensorial (9)
Sensorial experience (9)	Staff (4)
Staff (4)	
Store layout (3)	

APPENDIX E.12 Question 15.5b: “Explain briefly what retail orientated tactics can be developed and implemented to assist, guide, and improve customers exploring the store and its offerings”

Participant	Responses to Question 15.5b	Categories
1	Surveys, communicate with customers, analyse competitors' data.	Customer requirements
2	Enough walking space with clear signage to guide customers, clearly marked prices	Store layout Display
3	A device should be attached to accessories for the customer to have interest and staff should be enticing customers to see the value in what they purchase	Product Interactions
4	A host is generally a great position to assist customers that wish to browse in the store so that the agent at the door remains at is posted to ensure every customer is handed over to the correct agent to assist and not let the customer feel unimportant or abandoned just because they are only browsing.	Hosting
5	Store layout should be presentable	Store layout
6	The proper branding guidelines ensuring that products are easily accessible by customers.	Branding Store layout
7	a host to direct customers to their desired products, answer any questions, provide various options	Hosting
8	Having demos for customer to use, accessories to feel, touch and try. Not too cluttered store. safe and secure environment for them. Having someone to assist the client during that experience and give knowledgeable information required	Display Store layout Host
9	With the touch and feel - Prices and benefits should always be clearly printed/communicated in order for the buying cycle to be as short as possible. Share as much as possible without saying much - verbally.	Displays

Participant	Responses to Question 15.5b	Categories
10	Bigger sized models of phones which prompt customers to interact with the handheld device, interactive signature, guiding the customer through voice to tables which are displaying specific brands	Product Display
11	Space and decor	Store layout
12	Execution	Execution
13	Strategically placed signage, more interactive cell phone displays, knowledgeable staff available for assistance, clear categorization of merchandise, and intuitive store layouts that encourage easy navigation.	Display Knowledgeable staff
14	Brand awareness – You can increase brand visibility and awareness at shop front and let specials be visible.	Branding
15	branding is also very important	Branding
16		
17	Simple and direct markings	Display

Categories	Themes
Display (6)	Atmospherics (16)
Store layout (5)	Staff (5)
Hosting (5)	Customer requirements (2)
Branding (3)	
Customer requirements (2)	
Product (2)	

APPENDIX E.14 Question 15.6a: “To what extent do you feel that customers having the opportunity to freely experience store merchandise (touch, feel, smell, examine and test retail merchandise) can influence customer experience assessments? Please explain.”

Participant	Responses to Question 15.6a	Categories
1	The product value increases once the person takes ownership of it – the endowment effect. Ownership essentially means control, and if a shopper can control something through touch, they are more likely to feel ownership which in turn increases how much they are willing to pay for a product.	Value Ownership
2	High ticket items result in buyer’s remorse if customers are not happy with the product. High tech and products like cosmetics require a customer to “experience” it before purchase	Merchandising
3	There is a need for live demo units for hands on experience	Demo units
4	Having display units or examples is needed for the customer to be sure that what they are seeing is going to fulfil their needs.	Display units
5	Customer can test and obviously have a feel of what they want to purchase at that moment than to wait till they get home only to find that it doesn't work for them, this will create a large number of returns .	Purchase decision Returns
6	Live units on display , good lighting with the brand colours that stands out pricing done from cheapest to most expensive.	Merchandising
7	absolutely vital to customer experience for customers to have that touch and feel experience.	Importance
8	That can enable customer to make a sound decision in their purchase and also reduce returns and ensure we do not have client who are not happy with their purchase.	Purchase decision Returns

Participant	Responses to Question 15.6a	Categories
9	To a GREAT extent that experience is one of the MOST influential in making sure the sale is closed.	Purchase decision
10	highly important	
11	Important many customers would like to feel and experience a product before deciding to purchase	Purchase decision
12	when they enter the store	
13	I believe a hands-on interaction allows customers to form a personal connection with the products , gain confidence in their purchase decisions , and leads to a more positive and immersive shopping experience , resulting in higher customer satisfaction and favourable assessments .	Connection Confidence Purchase decision Immersive shopping
14	Customers have to be allowed by feeling and touching products. Will ensure higher % of buying .	Higher sales
15	Brand awareness should be increased on store fronts and let promotional products be more visible (Example: Winter campaign)	Merchandising
16	Customer are mostly happy to buy what they can actually see and touch that is why in our stores we have dummy phone.	Higher sales
17	Customers are more swayed by items they can feel and touch- Marketing. it bring excitement on products and	Higher sales

Categories	Themes
Purchase decision	Purchase decision
Merchandising	Immersive shopping
Immersive shopping	Profitability
Returns	
Displays	
Value, ownership, connection, confidence	
Higher sales	

APPENDIX E.14 Question 15.6b: “Explain briefly which retail orientated tactics can be developed and implemented to assist and improve customers’ physical experience (touch, feel, smell, examine and test retail merchandise) of the store, staff, and store merchandise?”

Participant	Responses to Question 15.6b	Categories
1	There are multiple elements to this plan, including location, store, merchandise/assortment, visual merchandising, staff, service, mass media and communications, and price.	Atmospherics Merchandising Staff
2	Sample products, test equipment	Merchandising
3	The demo units make a customer to have a feel of what they want to purchase, and the agent should be knowledgeable of the product	Merchandising
4	Ensure that there is a wide variety of only the latest and best offers that will be available for the customer or the examples of the best deals to make the customers know that we are not just selling for their money, but to deliver on their needs (customer needs analysis)	Merchandising
5		
6	live unit, for touching and feeling the devices and examining.	Merchandising
7	instore live product demonstration, features and benefits highlighted	Merchandising
8	Demo units in store, knowledgeable agents who understand their product and able to give sound advice to client.	Merchandising Staff
9	A tablet or station that allows customers to enter/insert top 6 items they want to have on their devices - then a Top 3 is suggested for them (input - output)	Atmospherics
10	providing a more realistic experience (when it comes to testing out the device), restrictions, for example, the stickers on model devices should be removed.	Atmospherics

Participant	Responses to Question 15.6b	Categories
11	Have live demos, gaming areas , high tech areas, tech specialists to demo and explain features etc	Merchandising Atmospherics Staff
12	live units	Merchandising
13	To improve customers' physical experience in the store, Telkom can set up interactive displays for hands-on exploration, offer product more life units, train staff to provide demonstrations and guidance, and maintain a clean and organized environment for easy access to merchandise.	Merchandising Staff Atmospherics
14	Great Atmosphere, engage with customers. Easy pay points, provide Wi-Fi	Staff Atmospherics
15	Tech specialist, Back-office agents in Flagship stores, Live demos, and Gaming stations for customers to feel and experience the Xbox S series before purchasing.	Staff Merchandising Atmospherics
16	Promotions	Merchandising
17	Display all offerings. have a dedicated trained agent to take the customer through the products. USP, benefits and disadvantages which is very important. We always only focus on advantages and exclude disadvantages. We need to be honest with regards to how the products.	Merchandising Staff

Categories	Themes
Merchandising (13)	Merchandising (13)
Atmospherics (7)	Atmospherics (7)
Staff (7)	Staff (7)

APPENDIX E.15 Question 15.7a: “To what extent do you feel that customers engaging with considerate well trained and knowledgeable store staff during their Authentic journey in the retail store can influence customer experience assessments? Please explain.”

Participant	Responses to Question 15.7a	Categories
1	Engaging with customers is critical in a sense that the customer can ask questions and the staff can build a rapport with the customer. This makes it easy for the customer to decide.	Confidence (4)
2	Extremely important – customers need to feel confident that staff know what they are doing	Informed decisions (1)
3	The more unspecified features the customer is made aware of, the more the customer will develop interest in the product	Knowledgeable staff (4)
4	If a customer is browsing this indicates uncertainty, assisting the customer, but not being overbearing or pushy will provide confidence in the customers uncertainty regarding the product and the customer would be able to determine from the agent's assistance if this product will fill their needs.	Educate customers (4)
5	Customers will get the best effort service as the product will be properly explained.	Expectations (4)
6	approach customers with a smile at all times and ask proper questions to open up the customer experience.	
7	engaging with customers is very important as some customers feel intimidated when they get into the store environment. Ask relevant questions as customer walks around store. Store staff must be knowledgeable on products and services	
8	Acknowledging the customer at all times, keeping eye contact when selling the product, answering customer questions, or giving detailed feedback if in doubt.	

Participant	Responses to Question 15.7a	Categories
9	To a great extend because customer enjoy talking to a confident, knowledgeable person , that assists in removing the most thinking and major decision making from their plate. Reduces research time as well.	
10	a Knowledgeable agent builds a trust relationship with the staff , the product, and the service.	
11	Very high - specialists can inform customers of features that could influence the sales process	
12	when they're asked questions	
13	When customers interact with helpful and informed staff members throughout their Telkom retail Authentic journey, it creates a positive and personalized experience, boosts their confidence in making purchase decisions , and leads to higher satisfaction with the overall shopping experience.	
14	To all extend, customer experience strategy will depend on your staff product knowledge , customers will buy from staff that know there needs and provide good product knowledge	
15	customers would like to feel, touch and be well informed of the products they are purchasing from us.	
16	Yes, because staff that is trained is confident enough to sell.	
17	Engaging customers ensures that customer are able to make a sound and well-informed decision	

Categories	Themes
Confidence building (4)	Confidence building (8)
Informed decisions (1)	Education (5)
Knowledgeable staff (4)	Expectations (4)
Education (4)	
Expectations (4)	

APPENDIX E.16 Question 15.7b: “Explain briefly what retail orientated tactics can be developed and implemented to promote staff engagements with customers with the aim to improve customers’ experience assessments”

Participant	Responses to Question 15.7b	Categories
1	Product knowledge, practice active listening, improve technical skills, be solution focused	Product knowledge
2	Employee of the month awards visible in the store	Rewards
3	The customer needs to know the pros and cons of the product to make a calculated and wise decision by being guided fully by the agent	Product knowledge
4	Agents should treat every customer with the same level of respect to have the end goal of turning every customer's query or browsing into a sale.	Respect
5	Product training is key	Product knowledge
6	Relationship building.	Relationship
7	staff must be trained well, be able to handle any questions without waffling, explain pros and cons of products. Understanding what is customers' needs .	
8	Product knowledge, correct product to sell, customer service training, agents to be confident in selling those products.	Product knowledge Training
9	Specialisation	Staff specialisation
10	Staff should be updated on the latest products and services at all times.	Product knowledge
11	Have well trained specialists on hand to assist customers. Ongoing upskilling and training on new products and services. Recruit correctly	Availability of staff
12	Constant training on customer service	Training
13	To improve customer experience assessments, Telkom can implement retail-oriented tactics such as training staff to be friendly, kind, approachable, and knowledgeable, encouraging them to actively	Trained staff

Participant	Responses to Question 15.7b	Categories
	engage with customers by helping, recommendations, and personalized interactions.	
14	Communicate regularly, invest in wellbeing, empower staff.	Empowerment
15		
16	Training and workshops	Training
17	Always have agents available for assist a customer with whatever question concern they might have	Available staff

Categories	Themes
Product knowledge	Staff
Staff Training	
Staff empowerment,	
Cust experience assessments	
Availability of staff	
Respect	
Relationship	

APPENDIX E.17 Question 15.8a: “To what an extent do you feel that the opportunity to experience open and frank exchanges and interactions relating to the product/service choices with knowledgeable, appreciative, courteous, and interpersonally skilled staff can impact customer experience assessments? Please explain.”

Participant	Responses to Question 15.8a	Categories
1	It gives the customer peace of mind that they asked all relevant questions and researched on the service/product. Openness also helps in a sense that the customer can tell the staff about past experiences with products and services. this will be a learning curve for retailers.	Trust Feedback
2	Again, knowledgeable staff is necessary when customers are not sure about which product to choose or what specifications would meet their requirement.	Knowledgeable staff
3	Making customers aware of other products that are similar to what they need and what is value for money. The customer needs to be assured that by buying the cheaper device does not mean less quality, however the agent needs to share the pros and cons	Cross and upsell
4	If a store has regular customers that might have a specific agent they want to see in store that is no longer there or has been moved, this creates a new expectation from the customer that all the agents in store have the same knowledge in order to assist them the same way as the agent that is no longer there, if this doesn't happen you could potentially lose a customer that has been going to one store for years	Trust
5	Agents will demonstrate the product and show to the customer how it works, and this will give the customer the best experience on the product.	Cross sell and upsell
6	Highest extent. very important.	
7	Honesty is still the best policy. when staff are open and honest they build rapport with customers	Trust

Participant	Responses to Question 15.8a	Categories
8	That can ensure that the customer is valued, and they are sold a product which agent is confident about. E.g. Warranty of the product, durability, length of contract, insurance and its importance, packages benefits.	Trust
9	Over and above the touch and feel experience customer need someone KNOWLEDGABLE & CONFIDENT to talk to about the products and services - VERY IMPORTANT	Knowledgeable staff
10	it will give the customer a realistic and straight forward expectation.	Trust
11	High - a noisy cramped store environment can deter customers from purchasing there. Layout of the store can inhibit open discussion	Atmospherics
12	they will offer exactly what the customer want	Trust
13	Having the opportunity to engage in open and honest conversations with knowledgeable, appreciative, courteous, and interpersonally skilled staff can greatly impact customer experience assessments. When customers feel heard, understood, and valued by sales agents who can provide helpful insights and recommendations, it enhances their overall satisfaction, builds trust in the Telkom brand, and leads to positive assessments of their experience.	Knowledgeable staff
14	Say thank you and always stay present. Smile. Never say, I don't know. Don't make promises you can't keep.	Knowledgeable staff
15	Agents to be Knowledgeable on the products they sell to customers. When an agent is confident with their product, they are able to "close" the sale.	Knowledgeable staff
16		
17	The customer is able to go for the correct product based on their need because they would have	Trust

Participant	Responses to Question 15.8a	Categories
	received information from an expert on the products	

Categories	Themes
Trust (7)	Trust
Knowledgeable staff to engage (5)	Staff
Cross and up selling (2)	Atmospherics
Store atmospherics (1)	
Customer feedback (1)	

APPENDIX E.18 Question 15.8b: “Explain briefly what retail orientated tactics can be developed and implemented to ensure that retail staff engagements with customers’ support staff, performing the roles of guide, teacher, coach, personal assistant, expert, advisor, consumer advocate, translator, persuader, performer, and transporter with the aim to improve customers’ experiences with retail store staff?”

Participant	Responses to Question 15.8b	Categories
1	It will assist because the customer will be confident in getting all aspects of advice and knowledge regarding their purchase.	Trust
2	Information desk staff responsible for specific areas within the store to assist customers	Information desk Staff availability
3	The customer's needs come first so that the agents should not be thinking of making more commission by persuading the customer of buying an unnecessary expensive device which the customer may find too complicated to keep	Customer first
4	I feel weekly documents discussions are needed with your team to ensure they are not falling behind with the latest product changes and to make sure that your team is fully equipped at all times and if not this will be picked up in these discussions mapping a picture for the leader of the team to fill the gaps, a lot of people can't speak in a group and you would get more out of them during these session and they become more personal and not group oriented.	Feedback sessions Staff equipped
5	Be trained on the products to be able to advise and demonstrate to customers	Training
6	training very important as well as soft skill training and conflict management.	Training
7	explain in simple manner dependent on customers understanding. Take time with each customer. keep promises to customers especially when you have to get back to customer if they have any unanswered questions. what is the expected turnaround time for delivery	Customer first

Participant	Responses to Question 15.8b	Categories
8	Confident in selling, understand your product, put yourself in the customer shoes.	Training
9	Have specialists in store	Specialists
10	Soft Skills training, practical exercises and testing their skills and knowledge, forming a community of practice where desired behaviours and skills are modelled. The training process, however, should not be rushed and should be implemented thoroughly.	Skills
11	Care should be taken with store design. Fit for purpose furniture and fittings provided. Agents to be schooled in the art of communication and active listening, problem solving techniques.	Atmospherics Skills
12	Training	Training
13	To improve customers' experiences with retail staff, retailers can develop retail-oriented tactics that include comprehensive training programs, enabling staff to fulfil various roles such as guides, teachers, coaches, personal assistants, experts, advisors, consumer advocates, translators, persuaders, performers, and transporters. These tactics aim to provide comprehensive support, enhance interactions, and meet diverse customer needs.	Training
14	Welcome store visitors and introduce yourself. Ask the walk-in customer how they are doing. Ask about their needs. Deal with negative response.	Customer first
15	Upskill agents and managers on new and promotional products. The company can also suggest to always involve agents and managers on business decisions which will affect them directly.	Upskilling
16	Team work	Teamwork
17	Well trained, customer centric agents with good products knowledge.	Training

Categories	Themes
Customer first (3)	Staff (17)
Staff (13)	Atmospherics (2)
Feedback sessions (1)	
Atmospherics (2)	

APPENDIX E.19 Question 15.9a: “To what extent do you feel that customers appreciating staff embracing and responding (cognitively and emotionally) to their unique retail requirements, opinions, and recommendations can influence customer experience assessments? Please explain.”

Participant	Responses to Question 15.9a	Categories
1	Customers don't always appreciate staff no matter how the staff tries to assist them. Retail staff must always have a thick skin and	Acknowledge customer expectations/needs (8)
2	In the case of a complaint or return customers wants to feel that they are listened to and understood	customer loyalty, mutual respect (1)
3	Listening attentively and asking follow up questions for a clearer understanding of the customer's needs	Create understanding, trust emotional connection (5)
4	If a customer feels that you are there just for the sale and not because it is your passion or reflect that you have the customers' needs in mind and not your incentive, it creates a trust relationship with your customers.	Matching customer expectations (1) +3,4,6,14
5	This will boost agents' confidence and will improve their customer service and do best with the next customer. this should be captured, and best agent award should constantly be issued to boost agent confidence	Staff education on customer needs (2)
6	Makes the customer feel welcome and valued.	Staff (4)
7	customer's must feel that their needs requests will be totally satisfied. Customer must have that feeling of trust in the staff member	
8	That will give confidence in the client that they bought the right product because the agent was understanding of their need and was able to assist them in making the decision.	
9	Staff interaction and opinion is very important to customers and forms a great part of the sales Authentic journey.	

Participant	Responses to Question 15.9a	Categories
10	On a social- emotional level, humans reciprocate one another's emotions. When the customer senses excitement about the product when it is being sold, they are more likely to become excited about it themselves.	
11	unsure	
12	customer centric	
13	Customers greatly appreciate when staff embrace and respond to their unique retail requirements, opinions, and recommendations, both cognitively and emotionally. When staff genuinely listen, understand, and cater to individual needs, it creates a personalized and meaningful experience that fosters customer satisfaction, loyalty, and positive assessments of their overall retail experience.	
14	to all extend - customers feel satisfied if staff fulfil their needs	
15	Not Certain	
16	So, we can be able to learn or correct their mistakes and learn from them.	
17	Customers need to know that their opinions/suggestion matter to better improve on services and products. ultimately, we are all here because of them	

Categories	Themes
Acknowledge expectations/needs (5)	Needs (12)
Mutual respect, appreciation (1)	Connection (6)
Emotional connection (5)	
Matching expectations (5)	
Staff education (2)	

APPENDIX E.20 Question 15.9b: “Explain briefly what retail orientated tactics can be developed and implemented to ensure that retail staff fully (cognitively and emotionally) embrace in-store customer behaviour in a manner that would impact positively on customer experience assessments”

Participant	Responses to Question 15.9b	Categories
1	Identify the staff's weaknesses & strengths, define staff roles properly, put effective ER practices in place for all staff	Staff
2	Designated staff to assist with complaints & returns	Staff
3	Never interrupt the customer when explaining their needs. Remember that the technical jargon does not usually assist in making the customer understand. Be plain and simple	Own customer
4	By regularly engaging with your team and getting their views on matters instead of just bombarding them with policies and procedure. Engaging and getting the team to understand the meaning behind the policies and procedures creates a confidence when they need to relay this to a customer because they understand it. Engaging also assists with individuality and not just one group there to sell, their place matters within the team and they won't feel like just a number.	Briefings
5		
6	Customer centricity.	Own customer
7	staff must understand the value the customer is in his environment. Own the customer. Be hospitable towards customers.	Own customer
8	Creating a close relationship with the client and ensure to them that they can contact you should they want clarity when it comes to the purchase or product recommended (approachability).	Relationship
9	keeping in touch with customers even after the sale (successful or not) - for this experience to pay off close to 100%	Own Customer

Participant	Responses to Question 15.9b	Categories
10	empathizing with the customer's individual needs and situation/ background	Own customer
11	unsure	
12	knowledge	Training
13	To ensure positive customer experience assessments, retailers can implement tactics like empathy training, active listening, personalized recommendations, and fostering a supportive work culture, encouraging retail staff to fully embrace and understand in-store customer behaviour.	Training
14	Welcome store visitors and introduce yourself. Ask the walk-in customer how they are doing. Ask about their needs. Deal with negative response.	Skills
15	Not Certain	
16	Customer service and selling skills.	Skills
17	Stores can have a suggestion/complaints box for customers. electronic system in place where they can also feedback on level of service received in store and overall experience on items/products bought	Suggestion box

Categories	Themes
Own the customer (5)	Customer focus (5)
Staff empowerment (7)	Staff (10)
Relationship (1)	
Suggestion box (1)	
Briefings (1)	

APPENDIX E.21 Question 15.10a: “To what an extent do you feel that processing a sales transaction in a friendly and efficient manner through effective and adequate point-of-sale technology, and well-trained staff can impact on customer experience assessments? Please explain.”

Participant	Responses to Question 15.10a	Categories
1	It will shorten the visit and avoid customers from staying long and getting irritated. When a customer is irritated, they start focusing on all bad experiences even if they were happy.	Effective
2	Customers' time is valuable and therefor they do not want to stand in a queue or wait long before being assisted. Quick, efficient check out processes are critical to show customers that their time is respected	Effective
3	The customer being satisfied with the explanation by the agent and also the customer commends the agent for a sterling job	Staff
4	when finalizing a sale, the agent must ensure to be clear and discuss all the warranties with the customer and not just slack off now because the sale has now been made, level of service must remain the same.	Staff
5	Agent shouldn't over sell the product to customers as soon as the customer agrees do not continue to explain the product, close the sale, and keep it short and simple before you lose the customer.	Staff
6	that's all that is needed to successfully execute a sale transaction.	Effective
7	Staff must show the customer their expertise. have the ability to handle objections and questions whilst busy with processing of order. Set customers' expectations. i.e. timelines at this stage	Staff

Participant	Responses to Question 15.10a	Categories
8	It ensures that the customer is important, and the customer got value for their money and that we value them as a business.	Customer-centric
9	this is important because at that point - the end has to be spectacular - it will stay in the mind of the customer for longer	Customer-centric
10	largely. I feel this question has an obvious answer, because a non-friendly and inefficiency will lead to dissatisfaction and poor reviews/ feedback.	Customer-centric
11	Vital - it creates the impression of a well organised and efficient organisation that can be trusted	Effective
12	customer will call again	Retention
13	Processing a sales transaction in a friendly and efficient manner through effective point-of-sale technology and well-trained staff can have a significant impact on customer experience assessments. When customers experience a smooth and seamless checkout process with friendly interactions and minimal wait times, it leaves a positive impression, enhances customer satisfaction, and contributes to favourable assessments of their overall shopping experience.	Staff Effective Retention
14	to all extent - customer don't have to wait long and is happy and satisfied with the purchase- might buy some more products	Retention
15	Even though the sale has been "closed", an agent can never stop selling because of the customer experience the customer had. the customer would always recommend.	Staff
16	Yes	
17	The process becomes seamless and gives surety to the customer that they have made a well-informed decision	Effective Retention

Categories	Themes
Execution (6)	Customer focus (3)
Retention (4)	Execution (12)
Staff (6)	Retention (4)
Customer-centric (3)	

APPENDIX E.22 Question 15.10b: “Explain briefly what retail orientated tactics can be developed and implemented to ensure that retail staff effectively execute and conclude a sales transaction.”

Participant	Responses to Question 15.10b	Categories
1	Practical Training & daily supervision	Training Management
2	Quick check-out counters, self-help payment facilities	Processes
3	Word of praise coming from the customer goes a long way and also it needs to be acknowledged for encouragement.	Training Needs analysis
4	There are policies and procedures that guide the agents to follow the correct compliance path, accountability must be driven to enforce this behavior and the managers need to ensure to lead by example and set the bar high and remain firm, fair, and consistent.	Processes Training Management
5	Selling skills training	Training
6		
7	Being patient with customer. Ask customer if he would like to take a seat. ask customer if he would like to browse thru broad sheets whilst you are busy with processing.	Training
8	Treat customer with respect, value their presence in store and thank them for choosing your store. Calling them by their name throughout the process and making sure the process is smooth.	Training Processes
9	giving training on - End of experience "experience" make it part of performance output and NPS	Training
10	incorporating prior feedback (daily) to improve your skills and learn new ones through training - specific skills like how to profile your customer and which terminology to use but also to avoid.	Needs analysis Training
11	Train staff well on existing systems and do refreshers periodically. Adapt and streamline	Training Processes

Participant	Responses to Question 15.10b	Categories
	business processes to eliminate waste and focus on the customer.	
12	by asking questionnaire	
13	Provide comprehensive training on point-of-sale systems , equipping staff with product knowledge and pricing information, encouraging friendly and efficient customer service , optimizing checkout processes for speed and convenience .	Training Management Processes
14	minimize the duration of the sales process	Processes
15	Be friendly , introduce yourself , conduct a need analysis and the response you receive from the customer will determine which product/service you can offer the customer	Training Needs analysis
16		
17	Retail staff need to know how to open, pitch and when to close a sale. Training	Training

Categories	Themes
Training (12)	Training (12)
Systems and processes (6)	Systems and processes (6)
Needs analysis (3)	Management (6)
Management (3)	

APPENDIX E.23 Question 15.11a: “To what extent do you feel that the customer shop exit process can have a positive impact on a customer’s overall shopping experience? Please explain.”

Participant	Responses to Question 15.11a	Categories
1	This will assess the overall customer experience within your store and identify opportunities to improve retention and engagement.	Overall assessment
2	It's always nice to be greeted when leaving the store, but not essential	Relationship
3		
4	If you greet a customer after a sale you create a more personal feeling and keep your attention on the customer and not brushing them off to get to the next customer, thus this customer would want to come back to the store and get assisted by the agent again, important to start a customer base.	Relationship Retention
5	A proper send-off agents should acknowledge the customer for the sale and thank them for choosing their store	Relationship
6	makes customer to come back the relationship continues.	Retention
7	The customer must exit the store knowing that his needs will be met and exceeded. he must be able to send staff more referrals based on his positive experience	Referrals
8	So that the customer can come back to the store or even word of mouth in promoting the business or even the product.	Retention Referrals
9	The last mile is just as important as the beginning of it all.	Overall assessment
10	it is less important as most customers are in a hurry to get home and use their devices, however, some experiences can be celebrated by means of a big screen interview as a fun feed-forward activity.	Overall assessment

Participant	Responses to Question 15.11a	Categories
11	Important - even if it a thank you have a nice day greeting.	Relationship
12	giving the best service at all times	Retention
13	The customer shop exit process can have a significant positive impact on a customer's overall shopping experience . When customers are provided with a smooth and hassle-free exit process, such as easy access to exits, well-placed signage for guidance, efficient payment and bagging procedures, and friendly farewells from staff, it leaves a lasting impression and contributes to a positive assessment of their shopping experience.	Overall assessment
14	To all extend - Customer will come back in future	Retention
15	The customer must be able to send staff more referrals based on their positive experience.	Referrals
16		
17	The whole process/experience starts from when the customer walks in the store until they leave the store. It does not end at the POS after the customer made the purchase.	Retention and referrals

Categories	Themes
Final assessment (4)	Retention and referrals (17)
Relationship (4)	
Retention and referrals (9)	

APPENDIX E.24 Question 15.11b: “Explain briefly what retail orientated tactics can be developed and implemented to ensure that the process of customers exiting the retail store is conducive to a lasting positive customer experience.”

Participant	Responses to Question 15.11b	Categories
1	Consistency with the above process	Training
2	If the cashier did a good job and thanked the customer for their valued support it would be sufficient	Training
3		
4	Regular role play during morning meeting assisting agents to remember the basics and not falling into habits of slacking due to pressure and surrounding.	Feedback mechanisms Training
5	Customer service training	Training
6	building relationships with customers and implementing a good after sales support system.	Training After sales processes
7	ask the customer if his requests /needs will be met. give the customer your details ie email address should he have any future questions. give customer timelines. under promise and over deliver	Rituals Feedback mechanisms
8	Thanking the customer for their purchase, calling them by their name as they leave the store.	Training
9	Thanking - and wishing a great day goes a long way. Have a survey on the exit whilst its fresh in mind.	Training Feedback mechanisms
10	Exit interviews conducted in a fun and creative manner, especially for new customers or elderly customers who have never used smartphones and are now purchasing a smart device.	Feedback mechanisms
11	Train staff to greet customers by name , to thank them at the end of the transaction , to provide them with after sales contacts etc	Rituals After sales processes
12	friendly	Training

Participant	Responses to Question 15.11b	Categories
13	To create a lasting positive customer experience during the exit process, retailers can implement retail-oriented tactics such as clear exit signage, efficient checkout procedures, friendly farewells from staff, and helpful amenities like bagging assistance. These tactics ensure a smooth and pleasant departure, leaving customers with a positive final impression of the retail store.	Atmospherics Rituals
14	To value customers' time, having a pleasant attitude, and providing knowledgeable and resourceful resources.	Training
15	Managers should have regular role plays with their agents on start-up meetings especially when there are promotional products running and to also train staff to greet customers by name and to thank them at the end of the transaction.	Role play/Training Training
16		
17	Congratulate the customer on making purchase. Thank them for visiting your store. Kindly ask them to visit your again	Rituals

Categories	Themes
Staff (8)	Staff (14)
Exit rituals (6)	Processes (7)
Atmospherics (1)	
Feedback mechanisms (4)	
After sales processes (2)	

APPENDIX E.25 Question 15.12a: “To what extent do you feel that retail entities sourcing and eliciting experience feedback from customers and then implementing changes accordingly can impact on future customer experience assessments? Please explain.”

Participant	Responses to Question 15.12a	Categories
1	It will influence improved future experiences because these would have been learnings from previous customer feedback.	Improvements
2	Showing customers that their opinion matter and that the company strives to make the Authentic journey through the store more pleasurable and easier is important to customers	Value customer
3	We need to strive for positive feedback for word of mouth can make or break the business	Retain
4	I think if there is a complaints and complements book by every agents work station this provides all customers the opportunity to provide feedback on their experience in your store because the book will be there and the customer does not have to wait for the NPS SMS before they can give feedback while the experience is fresh in their minds, customer base can also be obtained from these books and unhappy customers can be reapproached to change their experience and review by going the extra mile as a team leader and speaking to the customer about their negative review	Retain
5	Customer suggestion is important to improve future customer experience and also retain other customer	Retain
6	very important	
7	unfortunately, this does not happen in retail in South Africa, customers are at the mercy of our companies' policies and processes	
8		
9	After sales is just as important as the start. MAKE IT LAST in the customer's mind. Have an after	Improvements

Participant	Responses to Question 15.12a	Categories
	sales call to the customer to see how the service was and products feedback.	
10	largely because the customer's feedback today will improve our customer service tomorrow.	Improvements
11	Important so that past mistakes can be corrected and can build on what went right	Improvements
12	always call back customers for feedback	Improvements
13	I believe that retail entities like Telkom sourcing and soliciting experience feedback from customers and implementing changes accordingly can have a significant impact on future customer experience assessments. By actively listening to customer feedback, making necessary improvements, and demonstrating a commitment to addressing concerns, retailers can enhance customer satisfaction, build loyalty, and improve future assessments of the overall retail experience.	Improvements Build loyalty
14	To all extent - feedback from customers will tell us where to improve and where we were good, we can tell other potential customers.	Improvements
15	Email or call customers back for service feedback	Improvements
16	Customer feedback is a powerful information that can give you crucial insights into every part of your company helping you make more money or cut marketing expenses.	Remain relevant
17	With the ever-changing trends and technologies, enables the business to be relevant up to breast with new trends	Remain relevant

Categories	Themes
Improvements (8)	Improvements (8)
Customer matters (2)	Growth (8)
Retain (3)	
Remain relevant (3)	

APPENDIX E.26 Question 15.12b: “Explain briefly what retail orientated tactics can be developed and implemented to ensure an effective process of obtaining, considering, developing, and implementing customer experience feedback to enable fine tuning or adapting the key drivers towards improved customer experiences.”

Participant	Responses to Question 15.12b	Categories
1	Understand your audience, define a clear customer experience vision, build a strong team to increase customer experience. Invest in the right system and tools to level up customer experience.	Customer focus Training Systems
2	Voice of the customer (VOC) programmes, feedback reviews on google, suggestion boxes	Feedback
3	Acknowledging the feedback from customers and sharing it among all staff	Feedback
4	Managers of stores should treat the feedback received from NPS as very critical, this affects sales and possibly negative word of mouth from that customer to others, domino effect if not treated as a critical area.	Feedback
5		
6	Surveys and good after sales support system are very important.	Feedback Support systems
7	Openness with customers, promise feedback timeously, escalate should there be a problem i.e. credit vetting. Request feedback from customers questionnaires	Customer focus Feedback
8	NPS, email feedback or questionnaires, at the door quick feedback, SMS feedback.	Feedback
9	Talking to customer will reveal a lot - Keep in touch, even for sharing current specials and promos	Feedback Customer focus
10	Applying training on specific (not general) topics that was provided through customer feedback and ultimately testing/ comparing new feedback after the tactics were implemented	Training Feedback

Participant	Responses to Question 15.12b	Categories
11	Follow up sales, questionnaires, or service rating system to be in place	Feedback
12	training on customer service	Training
13	Retailers can ensure an effective process of obtaining, considering, and implementing customer experience feedback by using surveys, actively listening to suggestions, analysing data, and making necessary changes to enhance customer experiences. This enables fine-tuning and adaptation of key drivers towards improved customer satisfaction.	Feedback Data analysis
14	By encourage honest customer feedback	Feedback
15	Keep in touch with customers, inform them on current and promotional deals, ask for referrals.	Customer focus
16	Customer orientation is a business approach in which an organisation solves for the customer first. It's all about focusing on helping customers meet their goals. Essentially, the needs and wants of the customer are valued over the needs of the business. For customer service, this means your support team is focused on meeting customer needs.	Customer focus Training
17	Ensuring you review and action on feedback from customer	Action feedback

Categories	Themes
Feedback mechanisms (12)	Feedback mechanisms (13)
Customer focus (5)	Customer focus (11)
Training (4)	
Support systems (2)	
Data Analysis (1)	

APPENDIX E.27 Summary of Question 15.1a to Question 15.12a impact ('why') themes and consolidated themes per construct

Themes		Consolidated themes
<u>Impact (Q15.1a)</u> • Journey • Profiling	<u>Impact (Q15.7a)</u> • Confidence building • Education • Expectations	• Strategy • Staff • Information management • Atmospherics & merchandising • Retail systems, processes, technology tools
<u>Impact (Q15.2a)</u> • Trust • Merchandise • Atmospherics	<u>Impact (Q15.8a)</u> • Staff • Trust • Atmospherics	
<u>Impact (Q15.3a)</u> • Value perceptions • Staff	<u>Impact (Q15.9a)</u> • Needs • Connection	
<u>Impact (Q15.4a)</u> • Tone setting • Staff	<u>Impact (Q15.10a)</u> • Customer-centric • Execution • Retention	
<u>Impact (Q15.5a)</u> • Atmospherics • Staff • Sensorial experience	<u>Impact (Q15.11a)</u> • Retention & referrals	
<u>Impact (Q15.6a)</u> • Decision making • Immersed shopping • Profitability	<u>Impact (Q15.12a)</u> • Improvement • Sustainability	

Summary of Question 15.1b to Question 15.12b, retail orientated tactics themes to implement, promote, manage the 12E-framework and consolidated themes per construct

Themes		Consolidated themes
<u>Tactics (Q15.1b)</u> - Needs - Staff	<u>Tactics (Q15.7b)</u> Staff	- Strategy - Staff - Information management - Atmospherics & merchandising - Retail systems, processes, technology tools
<u>Tactics (Q15.2b)</u> - Staff - Atmospherics	<u>Tactics (Q15.8b)</u> - Staff - Atmospherics	
<u>Tactics (Q15.3b)</u> - Staff - Social media - Atmospherics	<u>Tactics (Q15.9b)</u> - Staff - Customer focus	
<u>Tactics (Q15.4b)</u> - Staff - Technology - Entrance atmospherics	<u>Tactics (Q15.10b)</u> - Staff - Systems, processes - Management	
<u>Tactics (Q15.5b)</u> - Customer requirements - Atmospherics & merchandising - Staff	<u>Tactics (Q15.11b)</u> - Staff - Processes	
<u>Tactics (Q15.6b)</u> - Merchandising - Atmospherics - Staff	<u>Tactics (Q15.12b)</u> - Feedback - Customer focus	

APPENDIX F: ANALYSIS OF SECTION D: IMPACT OF GOOD AND SATISFYING CUSTOMER EXPERIENCES.

This section deals with the after-effects or the impact of a customer having a pleasant and fruitful customer retail experience, or not.

APPENDIX F.1 Question 15.13: “To what extent do you feel that a good, bad, or indifferent customer experience can impact customer satisfaction levels? Please explain.”

Participant	Responses to Question 15.13	Categories
1	A huge extend because this is a deciding factor for the customer to come back or refer others	Retention (7)
2	Customer will not do repeat shopping if they had a bad experience – customers vote with their wallets	Referrals (6)
3	The service the customer experiences says a lot about the business hence we need the customer to review the service received and rate us accordingly	Staff motivation (1)
4	It will impact the way in which the customer engages with the agent customer will not be open to discussion and will just want to get out of the store as soon as possible.	
5	Bad service will impact the customer having to return and there won't be a word of mouth.	
6	Good customer experience goes a long way but bad experience never get forgotten.	
7	a excellent experience will get your customer to be your greatest sponsor. a bad experience can cause the customer to inform his friends and family that would cause a drop in customers visiting your store. Hence a drop in revenues. A satisfied customer will become a loyal customer.	

Participant	Responses to Question 15.13	Categories
8	That can determine whether the customer returns to the store or not	
9	Good service brings more customers to the store - Word of mouth	
10	The feedback 9/10 times will have a greater impact than specific feedback 5/10 times. It depends on the consistency and saturation of the feedback.	
11	Customers may not complain but they will influence others in some way or the other - word of mouth - if a potential customer hears of bad experiences, they may be hesitant to do business	
12	Execution	
13	A good experience leaves customers happy, satisfied, and likely to become loyal advocates , while a bad or indifferent experience can lead to disappointment, frustration, and decreased satisfaction, potentially resulting in lost business and negative word-of-mouth.	
14	to all extend- helps retain your customers or lose customers	
15	Great customer service result in word of mouth - Referrals	
16	Good customer experience will be able to keep our customers .	
17	Customers shop where they feel valued .	

Categories	Themes
Retention (7)	Retention (7)
Referrals (6)	Referrals (6)
Staff motivation (1)	Staff motivation (1)

APPENDIX F.2 Question 15.14: “To what extent do you feel that a good, bad, or indifferent customer experience can impact the customer engagement level? Please explain.”

Participant	Responses to Question 15.14	Categories
1	Customer Experience will always be impacting future engagements for that customer.	Retention
2	Happy customers will recommend, unhappy customers will leave and will tell others of their experience	Referrals
3	The customer will always share the service received with others, whether good or bad	Referral
4	I customer that is having a bad experience will make reflect this on the agent assisting them possibly leading to an Irate situation, but a customer that is having a good experience will reflect this in their interaction with the agent, the customer will then be more open to suggestions, options and sorting out a query.	Agent
5	Good service will allow customer to get their needs satisfied	Retention
6	Good customer experience goes a long way, but bad experience never get forgotten.	Retention
7	A good customer service will create a customer that would be more engaging and positive impact on your sales. A bad experience on the other hand will have a negative impact thus causing drop in foot traffic and lack of customer engagement.	Sales Churn
8	Good customer experience ensures more customers coming back or even telling others about your business, bad customer experience does the opposite.	Referral
9	If there's lack of confidence and knowledge the customer "switches off" and loses interest in everything you have to say.	Churn
10	Customers normally express how they feel immediately and will then refrain from engaging	Retention

Participant	Responses to Question 15.14	Categories
	further, in my experience. This, on the other end, can prompt agents to apologize or compromise excessively.	
11	Good customer experience will have a positive impact in that it enhances loyalty, where a bad experience may cause a customer to walk away	Retention
12	customer won't come back	Retention
13	I believe that a good, bad, or indifferent customer experience can strongly impact the level of customer engagement. A good experience can foster a deeper connection, increased loyalty, and active participation with a brand, while a bad or indifferent experience can lead to disengagement, reduced enthusiasm, and a lack of ongoing interaction or involvement.	Churn
14	All extend. - customers may just walk out the store without engaging - good potential sale	Churn
15		
16	Bad customer experience will loss customers to our competitors	Churn
17	If/when there is consistency in the service rendered, customers will visit the stores irrespective of whom they interact with, as opposed to selling who do they want to be serviced by. Customers will not be inconvenienced.	Retention

Categories	Themes
Retention (7)	Retention (13)
Referral (3)	Referral (3)
Churn (5)	Staff motivation (1)
Agent (1)	
Sales (1)	

APPENDIX F.3 Question 15.15: “To what extent do you feel that customer experiences has a direct effect on customer retention and customer re-patronage behavior? Please explain.”

Participant	Responses to Question 15.15	Categories
1	This has a huge impact because the customer will always go back to where they were treated best.	Retention
2	Happy customers will recommend , unhappy customers will leave and will tell others of their experience	Referral
3	The customer always shares the service received with friends and family (Our potential customers)	Referral
4	Happy customers are what make your customer base ensuring your business can continue	Business continuation
5		
6	if customers are treated well and satisfied most definitely they will come back .	Retention
7	whilst we want a customer to be satisfied, our ultimate objective is to create a loyal customer .	Loyalty
8	Growing customer base is due to good customer experience, low to no growth in customers can also be due to bad customer experience	Business continuation
9	It is most important	
10	Humans (customers) like returning to pleasant experiences which they are familiar with- and trust . They are also more likely to refer friends and family , because they want convenience for people that they know. It is not common for customers to experiment with a new store each time they want to do an upgrade or enquire on their contract or service	Trust Referral

Participant	Responses to Question 15.15	Categories
11	It impacts highly - if a customer is satisfied and engaged, they will be less likely to be enticed away by similar offerings from a competitor.	Retention
12	by giving best service	
13	Positive experiences foster customer loyalty , encourage repeat visits , and increase the likelihood of customers choosing the same business in the future, while negative experiences can drive customers away, reduce their willingness to return, and lead to potential loss of business.	Loyalty Retention Business continuation
14	to all extend - customers will in future go to other service providers or always return for future services - bad or good word of mouth.	Retention Referral
15	if there's lack of confidence and product knowledge the customer will definitely have bad customer experience	Trust
16	Yes, it has a good impact because when retaining a customer is the way to find out why customer is cancelling, and we can be able to improve.	Retention
17	Inconsistent customer service or lack thereof, makes it difficult to retain customers because they always shop at places where they feel welcomed and where they feel valued.	Retention

Categories	Themes
Retention (7)	Retention (7)
Referral (4)	Referral (4)
Business continuation (3)	Business continuation (7)
Loyalty (2)	
Trust (2)	

APPENDIX F.4 Question 15.16: “To what extent do you feel that customer satisfaction has a direct effect on customer re-patronage behaviour? Please explain.”

Participant	Responses to Question 15.16	Categories
1	This has a direct effect on customer behaviour and loyalty.	Loyalty
2	Happy customers will recommend, unhappy customers will leave and will tell others of their experience	Retention
3	Potential customers may increase or decline as a result of word of mouth	Referral
4	If the customer leaves the store happy and satisfied the customer will return to your store knowing they had a good experience and got what they went to the store for.	Retention
5		
6	if customers are treated well and satisfied most definitely, they will come back.	Retention
7	A satisfied customer will be your spokesman to friends and family. Hence more sales from customers who don't need much convincing.	Referral Business continuation
8	Increase in customers and happy customers always comes back or even go to the extent of promoting your business without you being aware.	Retention
9	It's one of the most important ways to keep the current customers buying from us.	Retention
10	largely (see above answer). This question is very similar to the previous one.	
11	If the customers is satisfied there is greater likelihood of loyalty. Dissatisfied customers will take their money elsewhere	Loyalty
12	when agents don't care	
13	I believe that customer satisfaction plays a crucial role in determining whether customers will choose to return. When customers are satisfied with their experience, they are more	Retention Loyal Business continuation

Participant	Responses to Question 15.16	Categories
	likely to become loyal , repeat patrons, while dissatisfaction can lead to decreased re-patronage and potential loss of business .	
14	Huge extent -A high satisfaction leads to greater customer retention , higher lifetime value, and a stronger brand reputation.	Retention
15	customer experience	
16	Yes it does, as will be able to keep more customers	Retention
17		

Categories	Themes
Retention (8)	Retention (11)
Loyalty (3)	Business continuation (2)
Business continuation (2)	Referral (2)
Referral (2)	

APPENDIX F.5 Question 15.17: “To what extent do you feel that customer engagement has a direct effect on customer re-patronage behaviour? Please explain.”

Participant	Responses to Question 15.17	Categories
1	Customers want to be engaged especially where they are going to use their money. Engagement helps with proper decision making and sourcing knowledge	Decision making
2	Happy customers will recommend, unhappy customers will leave and will tell others of their experience	Referral
3	The more the customers, the better the service they have received comparatively speaking	Better service
4	If a customer has a bad experience they will not return to the store, and there is the possibility of them discussing the bad experience with family or friends, having a negative effect on your foot count numbers.	Retention Referral
5		
6	Customers feel acknowledgement and hence they will keep coming back at all times.	Retention
7	When customers have that positive engagement with staff, they will trust and appreciate the openness. This situation will build loyalty and bring in more customer requests.	Loyalty Referral
8	Customer feels important to your business and will come back for more. I'm for the customer.	Retention
9	very important - customers will have a go to place for any product or service enquiry.	Retention
10	Engaging with customers and following up on their experience/ whether or not they are satisfied with the product or solution, will make them feel valued. Experienced are not only based on quality products but quality FEELINGS experienced.	Valued

Participant	Responses to Question 15.17	Categories
11	If the customers is satisfied there is greater likelihood of loyalty. Dissatisfied customers will take their money elsewhere	Loyalty
12	customer experience	
13	When customers are actively engaged with a brand, they develop a stronger connection, are more likely to become loyal, repeat patrons, and actively seek out future interactions and experiences.	Retention
14	Huge extend - the more engagement the more retentions and up selling leads to stable customer base.	Retention
15	Engagement helps with proper decision making and sourcing knowledge	Retention
16	Yes, it does.	
17	Increase customer satisfaction through exceptional customer service	

Categories	Themes
Retention (7)	Retention (7)
Referral (3)	Referral (3)
Loyalty (2)	
Valued (1)	
Better service (1)	

APPENDIX F.6 Summary of consolidated themes for Section D, Questions 15.13 to 15.17

Participants were questioned on the impact customer experiences have on customer satisfaction, customer engagement and on customer repatronage. They were also surveyed on the impact of customer satisfaction and engagement on customer repatronage.

Themes	Consolidated themes
Question 15.13	Retention Referrals Business continuation Staff motivation
Retention	
Referrals	
Staff motivation	
Question 15.14	
Retention	
Referral	
Staff motivation	
Question 15.15	
Retention	
Referral	
Business continuation	
Question 15.16	
Retention	
Business continuation	
Referral	
Question 15.17	
Retention	
Referral	