

Industry 4.0-enabled In-Store Customer Experiences – Evidence from Offline Retailing

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Abstract

In spite of the growing popularity of the online shopping, the offline stores still command more than 80% of the global retail sales. Going forward, the offline stores will coexist with their online cousins rather than bowing out as had been forecast in the early days of ecommerce. Delivering superior Industry 4.0 technology-enabled in-store customer experiences is the key for the survival of the offline retailers. This article briefly reviews the extant literature on the construct of in-store customer experience and then finds support for it in select cases of offline retailers using a qualitative exploratory way. It also finds that the adoption of I4.0 technologies cut across retail formats and product/service categories.

Key words

Industry 4.0, Retail 4.0, In-store customer experience, Customer journey, desire for convenience, desire for social presence, omni channel, Artificial Intelligence (AI).

Introduction

In spite of the hype around the online retailers and the prediction that the offline stores will die out, (termed the ‘retail apocalypse’ by media and consulting firms, (for a detailed discussion, see Philipose 2019) the latter still commands the lion’s share (95.2% in India, 84% in the USA and 85.9 % at global level) of all retail sales (Ali 2020, Statista Research Department 2015, Clement 2019). Quoting from research and advisory firm Forrester Research’s report, McKeough (2016) reports that “web-influenced sales in physical stores” (research online, buy offline) would have constituted about 38% of all USA retail sales that year. Like the other top technology firms, Indian technology giant Infosys also doesn’t believe in the retail apocalypse and cautions against writing off the offline retailing (Nath 2020). However, in order to escape the retail apocalypse and thrive in the Industry 4.0 era, the offline stores have to adopt the technologies of the time.

Aided by the obvious advantages over the online retail channels, and the Industry 4.0 technologies, the offline stores will continue to co-exist with the online channels, which are rapidly turning from being competing channels to sister channels. Sister channels in the sense

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that many offline retailers are going online and online are going offline. Termed omni channel strategy, this new trend in retailing has opened of many new opportunities for the retailers and new experiences for the customers. Technology will also help the offline stores to overcome some of the disadvantages they face as compared to the online stores like convenience, better price discovery by the customer, time saving, easy check out, and loads of data. (Whitesel 2018, Gilliland 2019, DaSilva 2020, Edelman 2018).

So, clearly, the offline will not only exist, but also will thrive along with the online, though the differences between the two may get increasingly blurred. For example, the physical touch in the offline is getting supplemented by digital touch. In fact, delivering online convenience with in-store personalization throughout the customer's journey is the name of the game for the offline stores in the days to come.

This paper reviews the constructs of in-store experience from the extant literature, particularly the components of it. Analyzing cases of some select retailers who have adopted some Industry 4.0 technology or other, the paper then looks for support for the constructs of in-store experience in the extant practices by these retailers.

Methodology

This is a qualitative exploratory research that attempts to gather empirical evidence of in-store customer experience delivery in the Industry 4.0 era. After analyzing the extant literature, it traces the constructs of in-store customer experience and its components. The Grewal et al (2019) typology of customer's 'desire for convenience' and 'desire for social presence' is selected for its simplicity to gather support for it in the current practices by offline retailers. Scanning the websites and trade reports based on key words such as retailing, AI, artificial intelligence, machine learning, smart mirrors, shopping bots, chatbot, virtual reality, augmented reality, smart mirrors, autonomous robot, neuroscience, natural language processing (NLP), shopping assistant, etc., twenty-one retailers were selected who have adopted some or the other Industry 4.0 technologies in their stores. Small caselets were written on their I4.0 technology adoption and the resultant facilitation of different components of in-store customer experiences. Triangulation was done to determine what type of in-store customer experience has resulted by the adoption of which technology. Triangulation was done by requesting separately three final year MBA students who are generally informed about retailing and the Industry 4.0 technologies to read the caselets and determine for each retailer, the particular adoption of technology would result in 'convenience' or 'social presence' or both for them (the students). The result is listed in Appendix-1.

In-Store Customer Experience

Importance of In-store Customer Experience

Improving customer experience (CX) is at the top of the priorities for the management of industry leaders in today's ultra-competitive world (Derksen 2015). Customer experience has been touted as the new source of sustainable competitive advantage by almost all the top consulting firms (E.g., Accenture 2020, PWC 2020, McKinsey 2017, Deloitte 2020, KPMG 2019). Academic researchers also assert the importance of customer experience in gaining competitive advantage (E.g., Johnston and Kong 2011, Havor 2019, Berry et al 2002, Bhandari 2016, Grewal 2017). Customer experience as a differentiator has been put ahead of product and service differentiators (Deloitte 2017)

In the ultra-competitive world of modern retailing, where the retail apocalypse (Peterson 2018, Valinsky) has decimated many famed retailers who failed to adopt and adapt to new technologies, delivering superior customer experience throughout a customer's retail journey has been touted as the recipe for survival and success. For example, great customer experience is linked to higher revenue, better customer loyalty, bigger market share (Feinberg 2016). Great customer experience is essential to earn customer loyalty to and advocacy for the retailer (Badgett, Boyce, and Kleinberger 2006).

Though for a retailer, improving the CX across all the channels is important, the data taken from the annual ForeSee Experience Index (FXI) 2016 (Eric 2016) shows how superior experience in a store may drive customer traffic and recommendations for a retailer to its digital channels.

Table 1: Impact of Customer Experience on Sales Conversion, Omni-Channel Buying, Repeat Purchase and Referrals

Channel	Proportion (%) of Customers having superior experience are more likely to...			
	buy from this channel	buy from other channels of the same retailer	buy from that retailer the next time they buy similar merchandise	recommend the retailer to others
Store	50	75	60	74
Mobile	64	42	50	54
Web	60	58	64	64

Source: Eric (2016)

Table 1 shows that while superior in-store experience leads to sale in the same channel (store) in case of 50% of the respondents, 75% of them would buy from other channels (mobile and web) of the same retailer. This could be explained in terms of the ROBO (research offline, buy online) phenomenon. In short, more traffic is directed from offline stores to the digital channels than the other way round. As far as generating repeat purchases are concerned, offline is second to the web channel. Offline channel also leads the other two in generating customer referrals. In short, positive customer experience in offline channel is still very important in feeding the digital channels, generating repeat purchases and customer referrals.

Retail customer's expectation of a superior experience is not restricted to first-hand products only. Of late, the customers of the circular economy are even demanding the same level of service and experience from the retailers of used products as those of the regular product (Please refer to the case of such a USA-based thrift retailer thredUP in the business media, e.g., de Leon 2019).

Constructs of Customer Experience in Literature

Starting from an early notion of customer experience by Abbott (1955), researchers have offered a number of definitions of customer experience. Meyer and Schwager (2007) have argued that customer experience is an internal and subjective response to a company's offerings through direct or indirect contacts. The company's offerings encompass, apart from the products and services and their features, their ease of use and reliability, and all the other touch points such as advertising, customer care, etc. (Lemon and Verhoef 2016). Customer responses encompass cognitive, affective, sensory, spiritual and social responses (Gentile, Spiller, and Noci 2007, Verhoef et al 2009, Lemke, Clark, and Wilson 2011, Bolton et al. 2014). Schmitt (1999) also identifies five types of customer experiences: 1) sensory (sense), 2) affective (feel), 3) cognitive (think), 4) physical (act), and 5) social-identity (relate) experiences. Verhoef et al. (2009) also agree with this construction of customer experience while defining the same in the retail context. De Keyser et al. (2015) also agree with the construct and add a sixth component, that is, spiritual. Reviewing the extant definitions, Lemon and Verhoef (2016) conclude that,

“...customer experience is a multidimensional construct focusing on a customer's cognitive, emotional, behavioral, sensorial, and social responses to a firm's offerings during the customer's entire purchase journey.”

Grewal et al (2019) in their “typology of new and futuristic in-store technology infusion”, simplify the components of in-store customer experience into just two: customer's ‘desire for convenience’ and ‘desire for social presence’. The reminder of this paper looks for support for this typology in some of the retailers who have adopted Industry 4.0 technologies.

Desire for Convenience

Convenience is mainly characterized by savings of time and effort spent for shopping by the customers (Berry et al 2002). Berry et al (2002), Seiders et al (2005) and Grewal et al (2019) have proposed five different dimensions of service convenience: decision convenience, access convenience, transaction convenience, benefit convenience, and post-benefit convenience.

Desire for social presence

Referring to a number of sources, Grewal et al (2019) argue that the desire for social presence is a felt presence of others which not necessarily mean physical presence. Apart from physical presence of human beings such as store associates, it could also include a machine such as a robot. Zhu, Benbasat and Jiang (2010) take a broader view of social presence by including

technology-enabled human connections such as online chats, video chats, and social media posts like those in Facebook, Instagram, Pinterest, etc.

Appendix 1 lists twenty-one cases of I4.0 technology adoption were analyzed and the resultant type of in-store experiences were determined, i.e. convenience or social presence.

Findings

Out of the twenty one cases, fourteen cases were found to be providing both in-store convenience as well as social presence. All the cases are providing technology-enabled superior convenience. Cases where chatbots, voice assistants, voice chat (Northface, Taco Bell, Macy's, thredUp, Uniqlo, Starbucks, American Eagle Outfitters), autonomous robots (Lowe's, Wal-mart), smart mirrors (Rebecca Minkoff) and users' social media walls (West Elm) are used are perceived to be delivering social presence. Moreover, wherever the technology has the ability to personally understand some aspect of the customer, such as Olay (skin type and skin age recognition), Sephora (face, skin and lip scanner), Macy's (detection of customer annoyance), Uniqlo (reading of customer's mood), Zara (recommendation on what will go well with the cloth already owned or selected), it is also perceived to deliver social presence. Additionally, in case of Wal-Mart where technology frees up the store associates from routine work to spend more time with the customers, the latter would feel the social presence more.

The retailers who have invested on technologies that deliver social presence are mostly the premium ones except for Wal-Mart which operates hypermarket discount stores. These retailers are in the furniture and home improvement category, Food and beverage, upscale departmental store, and beauty products categories.

The adoption of I4.0 technologies have been found to be cutting across retail formats and product/service categories.

Conclusion

While technology gives birth to new businesses and business models, it also gives a new lease of life to the so-called legacy businesses provided they adopt and adapt to new technologies. Industry 4.0 technologies are enabling Retail 4.0 in a big way. Contrary to predictions, offline retailing is thriving by adopting technology. In fact, the distinctions between the offline and online is getting blurred by the day. Delivering superior customer experience in any business has become the new differentiator. So also for the offline retailers. Using the I4.0 technologies, progressive offline retailers are delivering convenience and social presence. Though restricted to large retailers because of the higher cost of technology, with passage of time, adoption of I4.0 technologies is expected to pick up. This paper found support of the Grewal typology of customer's 'desire for convenience' and 'desire for social presence' as components of in-store customer experience. However, being an exploratory qualitative research based on use cases, it has quite a number of limitations. Scope for further research is quite wide and includes, but not

restricted to, customer perception of these technologies, the degree to which customers value the resulting convenience and the feeling of social presence from the use of these technologies, and the extent to which these technologies improve upon the five service convenience: decision convenience, access convenience, transaction convenience, benefit convenience, and post-benefit convenience.

Appendix 1: Cases of Technology-driven In-Store Customer Experiences-Convenience and Social Presence.

Sl No.	Retailer	Retail Format	Technology Used	Implementation	Components of Customer Experience
1.	Lowe's	Home improvement chain	LoweBot - AI-powered autonomous retail service robot with a large screen	The roaming interactive Bot helps customers find their way in the store by asking simple questions and providing directions and maps to their desired products. Shares specialty knowledge with the customers.	Convenience and Social Presence
2.	Walgreens	Pharmacy retail chain, grocery, health, beauty and wellness, baby products	AI-powered online, interactive map	The map helps to track the spread of flu from the number of anti-viral prescriptions it receives at more than 9,000 store locations. Customers in the affected areas get alerted and stores keep more of the flu-related stock.	Convenience
3.	Sephora	Personal care and beauty products chain	Color IQ - AI-powered handheld face and skin scanner, and Lip IQ – lip scanner	Personalized recommendation of cosmetics and lipsticks. Save time and effort needed to select the right products by trial and error	Convenience Social presence
4.	North Face	Outdoor recreation products	IBM Watson-powered chatbot	Recommends outdoor clothing after asking a series of questions on where, when and for what recreation activity a jacket of other clothing and accessories will be used.	Convenience and Social Presence
5.	Neiman Marcus	Luxury department store	AI-powered Visual (image and video) Search	Customer snaps at the clothes and accessories she sees in a picture, an advertisement, a billboard or on a person if she likes them. The retailer's NM app uses smart image recognition technology to recommend similar clothing or accessories.	Convenience
6.	Taco Bell	Fast food restaurant chain	TacoBot-AI-powered food ordering chatboat	The chatbot takes order, gives recommendations, answers questions, organizes group orders, takes payment, and gets witty at the end of an order.	Convenience and Social Presence
7.	Macy's	Upscale department store chain	Macy's AI-powered On Call Mobile Shopping Assistant	The chatbot helps to find the availability of a desired product and the direction to locate the same in the store. Additionally, it can detect when a shopper gets annoyed and alerts a store associate to help the customer.	Convenience and Social Presence
8.	Wal-Mart	hypermarkets, discount department stores, and grocery store chain	Autonomous Shelf-scanning robots	The robot finds out missing items in the shelves, items to be restocked, price tags that need to be changed, etc, thereby freeing the store associates to devote more time to the customer interactions.	Convenience and Social Presence
9.	thredUp	thrift store selling	AI-powered automated	Fixing of resale value of millions of unique secondhand	Convenience

		secondhand clothing and accessories	visual tagging and assignment of attributions to inbound second hand items using image recognition	items by determining their wear and tear condition. Using AI and predictive analysis, personalized style suggestions and service levels based on historical customer purchases, loyalty and receptivity to different offerings	
10.	Amazon Go and Amazon Go Grocery	Convenience Stores	AI-powered Just Walk Out Technology by others)	Automatically detects the items taken off the shelves (or put back) and kept in a virtual shopping cart. After the customer leaves the store, she is billed and the amount is charged to her amazon account.	Convenience
11.	Uniqlo	Clothing retailer	UMood, neuroscience-enabled mood sensorUniqlo IQ, machine learning-powered digital concierge service	UMood recommends clothing based on the reading of the customer mood. Google Assistant integrated Uniqlo IQ chatbot recommends curated clothing and the nearest store based on occasion, personal preferences, and daily horoscopes	Convenience and Social Presence
12.	West Elm	Furniture retailer	AI-powered West Elm Pinterest Style Finder	Neural network-powered visual (image and video) recognition technology to analyze Pinterest Boards to determine a user's personal style at home. Not just a typical recommendation engine as it does not rely on purchase and browsing history. Using machine learning, the Finder learns about a customer's style and color preference even from a single photograph.	Convenience and Social Presence
13.	Sam's West. Owened by Wal-Mart	Chain of membership-only retail warehouse clubs	AI-powered warehouse and Scan and Go App	Select items on the mobile and pay before going to the store to pick up. App computes shortest path to the shelves stocking customer's desired items in the shopping list on a map. Pick up items in the store and scan them using the app, pay and go.	Convenience
14.	Olay	Beauty products retailing	AI-powered Skin Adviser	Uses one selfie and a brief questionnaire on the customer's current skin care preferences. The online Skin Adviser app then determines skin age from the selfie and advises personalized skin care routine. AI also gives an estimate of the customer's aging without the use of Olay products.	Convenience Social presence
15.	Kroger	General retail chain	AI-powered mobile app and smart shelves	When a customer approaches a digitized shelf, it alerts her about the presence of items from her shopping list (entered into a mobile app by the customer), shows dynamically updates price and tailored advertisements. The mobile app, after taking input about the shopper and	Convenience Social presence

				her shopping list, matches the list with the digitized shelves, gives aisle location, and dynamic price information	
16.	Zara	Apparel and accessories retailing	Robots RFID Scanners	Robots fetch items from the back-end warehouse of the store for click-and-collect customers thereby reducing their waiting time at the store Customers get recommendation on what items might go well with their desired item after scanning its RFID tag	Convenience Social presence
17.	Starbucks	Food and beverage retailing	AI-powered My Starbucks Barista app that works like a voice assistant and chatbot	Customers can use voice or text chat to order, just like they talk to a barista, before they arrive in the store.	Convenience Social presence
18.	American Eagle Outfitters, Inc	Lifestyle clothing and accessories retailing	Chatbot interactive fitting room	The chatbot recommend gift options after giving a short quiz to the user The touchscreen in the trail room, upon scanning an item, gives product information, item recommendation, send request to store associates' mobile phones for additional sizes and colors, item availability in the store, indicates number of items in the cart and billing information.	Convenience Social presence
19.	Rebecca Minkoff	Fashion Retailing	AI-powered smart mirror	The smart mirror allows ordering drinks, flip through curated catalogues, order different items, sizes and colors for the store associates to deliver to the trial room, mail items details to customer for purchase at a later date from the same or another channel, and finally, the RFDI tags allow self-check out.	Convenience Social presence
20.	Nike	Sports goods	The AR-enabled Nike Fit phone app combines artificial intelligence, computer vision, scientific data, and recommendation algorithms	Measures each foot accurately to recommend the right size	Convenience
21.	thredUP	Women's and Kid's fashion resale marketplace	AI, machine learning and computer vision technology	The AI platform allows tagging each secondhand clothing and accessory with multiple attributes enabling customers finding what they exactly want, saves time and hassles of digging the shelves. Machine learning recalls customer preferences and offers curated experiences	Convenience

Sources: Based on Morgan, 2019 and respective company websites. Last column data is based on triangulation.

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