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Store of the future: Towards a (re)invention and (re)imagination of physical store space in an omnichannel context

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ABSTRACT

This paper explores the future of the physical store within omnichannel retail and specifically, the prerequisites of the designed retail environment in optimizing customer experience. Adopting an exploratory qualitative approach, primary data was obtained using semi-structured interviews with 20 industry experts.

The research makes a valuable contribution to the dearth of extent literature on experiential store spaces of the future, specifically within the fashion field. By connecting three topics of academic research - Omnichannel retail, the role of the physical store and in-store customer experience - it serves to suggest the prerequisites for designed retail environments in optimizing customer experience.

1. Introduction

Digitalization has profoundly impacted business and society and, has significantly, transformed (and continues to transform) retail in particular (Grewal et al., 2017; Hagberg et al., 2017; Lemon and Verhoef, 2016a,b). Hagberg et al. (2017) recognize that historically retail and digitalization are synonymous, yet the gravity of recent rapid change is very palpable, resulting in new business opportunities, business models, channel and touchpoint proliferation, purchasing processes and retail formats (Ibid, Lemon and Verhoef, 2016; Szymanska et al., 2017). Together with the increasing demands of connected and empowered consumers, digitalization is fundamentally altering the form and function of the physical store (Alexander and Kent, 2016; Alexander and Blazquez Cano, 2019).

Global retailing is worth $14.9 trillion, with the internet predicted to become the largest channel globally, accounting for 15.4% of sales by 2021. Coupled with advances in technology, retailers must respond to consumers permanent shift to buying online and for blended digital and physical experiences (Euromonitor, 2019). Repercussions of these disruptions include aggressive store closures, rapid rationalization (50,825 in UK, 2018) and bankruptcies (Global Data, 2019). However, what was signalled as the 'retail apocalypse' has shifted to a recognition that retailers must radically reconsider the purpose of the physical store within this transformed omnichannel environment (Stephens, 2018). With over 85% of retail sales still taking place in the physical store (Stott and Walker, 2018), digital-first online retailers moving offline (e.g. Bonobos) and new store openings succeeding, these are testament that the physical store remains relevant to customers (Hagberg et al., 2017; Stott and Walker, 2018; Walker, 2018).

In response, prominence has been given to in-store experiences, giving customers a convincing reason for patronising the physical store. Practices of experiential retail are widespread and increasing attention is being given to them, yet scholarly attention to the phenomenon is nascent (Bustamante and Natalia Rubio, 2017; Khan and Rahman, 2016; KPMG, 2019). Moreover, while a considerable amount of trade research has explored physical format evolution, there is still a lack of academic literature that addresses this issue (Botschen and Wegerer, 2017; Hagberg et al., 2017; Reynolds et al., 2007). This study therefore explores the future of the physical store within omnichannel retail and specifically, the prerequisites of the designed retail environment in optimizing customer experience.

The aim of the paper is to conduct an exploratory study of the reinvention of the physical store within omnichannel retail, an unexplored domain of research thus far. This aim is achieved through the following two objectives: first, to explore the current situation of the physical store in terms of its role, experience, integration with other channels, role of technology and consumers' expectations. Second, to offer a prognosis of the reimagined physical store in the future and in doing so, to establish prerequisites of the designed retail environment in effecting customer experience.

The first section presents an overview of the literature on omnichannel retail and the impact of digitalization, experiential retailing

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and the physical store. This is followed by an analysis of empirical research leading to a discussion of the qualitative findings and their implications within the reimagined store of the future in the fashion retail sector.

2. Literature review

2.1. The physical store within omnichannel retail

The integration of physical and virtual channels due to the emergence of internet-based marketing channels is considered one of the most significant changes in retailing (Brynjolfsson et al., 2013; Galipoglu et al., 2018; Huré et al., 2017). Retailers have evolved from being single-channel to embrace multi-channel and lately, cross-channel and omnichannel strategies (Verhoef et al., 2015). Even if these concepts have been used synonymously in the literature (Galipoglu et al., 2018) differentiation can be made based on the intensity of channel integration from the retailer's perspective and on the level of channel interaction from the customer's perspective (Beck and Rygl, 2015; Cao and Li, 2015). The concept of omnichannel represents a shift in the retail paradigm (Verhoef et al., 2015) precisely because it is rooted in consumer behavior. Nowadays consumers access the internet through an increasing number of digital devices and expect to consistently, interchangeably and simultaneously use a growing number of offline, online and mobile channels and touchpoints when shopping (Grewal et al., 2017; Picot-Coupey et al., 2015; Stein and Rameseshan, 2016; Verhoef et al., 2015). This synergistic use of channels and touchpoints is the *"answer to consumer expectations for the last 50 years"* (Rigby, 2011).

Thus, the emphasis of omnichannel is the interplay between channels and brands (Hsieh et al., 2012; Verhoef et al., 2015). It offers a holistic view of channels but is not limited to retail channels (e.g. physical store, online website) including mobile channels (e.g. mobile devices, branded applications), social media and customer touchpoints as well (Baxendale et al., 2015; Picot-Coupey et al., 2015; Verhoef, 2014; Verhoef et al., 2015). Touchpoints are considered as episodes of direct or indirect contact with the brand (Baxendale et al., 2015), which in turn means the customer can make a continuous journey, interacting with the brand more than with the channels (Kent et al., 2016; Piotrowicz and Cuthbertson, 2014).

Digital disruption has created empowered consumers with heightened expectations in terms of convenience, speed, efficiency, flexibility and consistency across channels inducing greater complexity in channel arrangement (Blázquez, 2014; Piotrowicz and Cuthbertson, 2014). The majority of retail sales take place in the physical store though (Hagberg et al., 2017) and for many retailers is still the most important and prominent channel (Huré et al., 2017; Kent et al., 2016) as retail stores are *"… unique in allowing consumers to touch and feel merchandise and provide instant gratification"* (Brynjolfsson et al., 2013, p. 23). However, the dominance of bricks-and-mortar has decreased as a consequence of the growth of online retail (Cao and Li, 2015). Also, the availability of online connectivity and the presence of digital devices in the physical store make the information about the product readily available (Hagberg et al., 2017) with risks of "showrooming behavior" consisting of using the physical store as a purely information channel and making the purchase online (Sit et al., 2018). As a consequence, the role of the physical store in omnichannel retail is being redefined as it becomes part of a larger and more connected experience.

While there is some evidence for radical innovation at strategic level, innovation in retail typically relates more to incremental newness, involving experimentation or continuous improvements (Latchezar and Reynolds, 2015). Among these, customer facing innovation has been found to be critical to retailers as it is *"visible and is seen to have major impact on brand positioning and differentiation"* (Latchezar and Reynolds, 2015 p.137). Thus, the physical store represents a key channel for retail innovation as it is the main (touch) point of face to face interaction with customers and is the place of convergence of multiple retail channels.

In spite of this scenario extant literature offers limited insight into the challenges associated with the move to omnichannel for the retail store (Picot-Coupey et al., 2015). A better understanding about specific strategies that improve the physical shopping experience and build relationships with customers is a priority for retail managers and scholars (Brynjolfsson et al., 2013; Picot-Coupey et al., 2015).

2.2. Customer experience

The concept of customer experience has been extensively reviewed in the academic literature. Based on Verhoef et al. (2009) it can be said that customer experience is holistic in nature and involves the customer's cognitive, affective, sensorial, relational and behavioral responses to the retailer or brand. These responses are the result of a journey of touchpoints along the pre-purchase, purchase and post-purchase situations (Lemon and Verhoef, 2016a,b). Thereby it results from the interaction between the retailer and the customer and comprises the complete consumption experience.

Holbrook and Hirschman (1982) identified consumption as a subjective state, hedonic as much as utilitarian, which recognized the experiential aspect of consumption (Holbrook, 2007). The goal in experiential strategies is to engage the consumer to create emotional bonds between a company and its customers, thereby becoming part of their life and memories (Pine and Gilmore, 1999, 2011). The *"economy of experiences"* postulates that consumers want experiences instead of mere products and are willing to pay more for them (Pine and Gilmore, 1999). It resulted in a number of new marketing approaches including experiential marketing or sensory marketing that assumes that consumers are rational and emotional human beings that seek to achieve pleasurable experiences (e.g. Schmitt, 1999; Schmitt and Zarantonello, 2015; Spence et al., 2014) and aims to engage consumers at cognitive, emotional, social, sensory and physical levels (Bustamante and Natalia Rubio, 2017; Schmitt, 1999; Verhoef et al., 2009).

Empowered consumers expect their shopping experiences to be relevant, personalized and lifestyle oriented (Alexander and Olivares Alvarado, 2017; Blázquez, 2014; Pine and Gilmore, 2011). Also, they get easily bored of the same type of stimuli, so the store experience needs to be constantly updated (Parsons, 2011). For fashion retailers it is especially important to develop a hedonic experience, so they are increasingly investing in experiential retailing (Stott and Walker, 2018; Wade Clarke et al., 2012). From this experiential perspective, the point of sale is defined as a cognitive and emotional apex where the interaction between the firm and the customer takes place (Spena et al., 2012). The store environment creates a holistic cognitive experience that must be emotionally engaging based on entertainment, design, customer involvement and sensory attributes (Alexander and Kent, 2016; Rigby, 2011; Spena et al., 2012).

2.3. Physical store experience

Kotler argued that buying environments can be consciously designed to produce certain emotional effects in customers through the use of atmospherics (Kotler, 1973). Extending Kotler's work, Turley and Milliman (2000) classified atmospheric cues into five categories including *external variables* (e.g. building or windows), *general interior variables* (e.g. lighting, music, or scents), *layout and design variables* (e.g. furniture, fitting rooms), *decoration variables* (e.g. pictures) and *human variables* (e.g. employees). According to the type of retailer some of these elements may be more relevant than others (Ballantine et al., 2015).

The design of the physical store is a reflection of the brand visual identity, which is relevant in terms of corporate identity (Melewar, 2008). Through brandscaping, the brand is transformed into a location and the image of the brand is communicated through the design of the building (Kirby and Kent, 2010). Being a place of convergence of multiple channels, the store layout acts as a signal of store intentions for consumers and has a strong influence on the perception gained about the rest of the environment (Ballantine et al., 2010). Hence, the store design must be able to translate the brand identity from the products and services into the customer experience and be congruent with the target's self-image (Ballantine et al., 2015; Jones et al., 2010).

Previous research has noted the importance of design to communicate brand stories and deliver experiences in the omnichannel scenario (Kent et al., 2015). As such, the use of technologies or the presence of digital signage contributes to the store environment in terms of design (Kent et al., 2015). Also, design plays an emotional role as the store becomes a place to develop relationships, which connects with the creation of sociable third places around the brand (Alexander, 2019; Crick, 2011). As a consequence, the physical space needs to be agile and responsive to format evolution (Alexander and Blazquez Cano, 2019). More specifically, the ability of the store to morph and evolve is considered a prerequisite in store design with an emphasis on flexibility, integration and entertainment (Alexander and Blazquez Cano, 2019).

In relation to human variables, customer service is one of the most influential reasons to go to a physical setting as customers expect a more personal shopping experience through the advice of store staff (Bäckström and Johansson, 2006; Huré et al., 2017). Accordingly, factors such as the location of employees, the quality of the interaction or the use of technologies to assist customer service must be considered (Ballantine et al., 2010; Puccinelli et al., 2009).

The creation of multisensory customer experiences is crucial (Alexander and Nobbs, 2016; Pine and Gilmore, 1999, 2011). The use of atmospherics is perceived holistically by the consumer and sensory cues must be consistent in order to offer optimal levels of stimulation and a more pleasant shopping experience without losing the focus on the core offering (Spence et al., 2014). The alignment in brand values and the specific store experience that supports the overall brand experience (Kumar and Polonsky, 2019) is also crucial. Experiential formats such as flagship stores, concept stores, pop-up stores or even third places are the best examples in the use of multisensory store settings that encourage consumers to experience, interact and to develop an emotional bond with the brand (Alexander, 2019; Alexander and Kent, 2016; Davis, 2014; Jones et al., 2010; Nobbs et al., 2012).

Continually evolving markets, heightened demand for experiences and digitalization growth has contributed to the rise of hybrid and innovative store formats where traditional boundaries are blurring (Bonetti and Perry, 2017; Reynolds et al., 2007). Successful new format appearances strengthen brand equity and help to revitalize, differentiate and improve brand value (Botschen and Wegerer, 2017). Within the fashion sector, consumers' demand for newness and experiences coupled with retailers' need to stand out is assimilated in flagships, concept stores, pop-ups and showrooms that collectively embody the shift from merely transactional to multi-functional hybrid retail spaces (Alexander and Kent, 2016). Fig. 1 captures the current form, function and features of the physical retail format.

Physical stores both impact and are impacted by the digitalization of retailing (Hagberg et al., 2017). The emphasis on experience creation has lead retailers to introduce advanced technologies in physical settings and to develop immersive retail experiences (Alexander and Olivares Alvarado, 2017; Bäckström and Johansson, 2006; Rigby, 2011). For example, augmented reality (AR), virtual reality (VR), intelligent fitting rooms, RFID (radio frequency identification), interactive digital screens and signage, iPads, WIFI, self-service checkouts and mobile applications are some of the most diffused (Ballantine et al., 2010; Pantano et al., 2018; Piotrowicz and Cuthbertson, 2014; Renko and Druzijanic, 2014). They serve to enrich customer experience, service, convenience and integrate the shopping journey (Bonetti and Perry, 2017; Renko and Druzijanic, 2014). A key facilitator of channel convergence is the increasing dominance of mobile devices, which have changed consumer purchasing behaviors in physical stores, link effectively to other technologies and fueled the development of new retail formats, such as click and collect and click and drive (Hagberg et al., 2017). A 'mobile first' approach is rapidly being adopted by retailers given its widespread usage (Shankar et al., 2016; Wang et al., 2015). More recently, the potential of artificial intelligence (AI) within retail has gained recognition, impacting the brand-customer relationship by enabling personalization and offering retailer's more capabilities to express the brand personality (Plastino and Purdy, 2018; Thomson, 2018).

The presence of technology redefines the store experience and store layout. On the positive side, technology allow customers to have access to a wider offer, customized services and new entertaining tools among others (Merle et al., 2012; Pantano et al., 2018). As a consequence, it is inferred that the frequency of visits and the time spent in store increases (Evanschitzky et al., 2015). However, the presence of technology in physical stores is still marginal (Bell et al., 2016) and in many cases is irrelevant to the customer (Blazquez et al., 2014). It has been suggested that employees should be provided with technology to make the shopping experience more relevant and be adequately trained to use it (Piotrowicz and Cuthbertson, 2014). In any case technology must be a medium, not and end, to create a superior customer experience in the store and an integrated experience between channels (Alexander and Olivares Alvarado, 2017; Blázquez, 2014).

In summary, customer experiences have become increasingly important within omnichannel retail with greater emphasis on the physical store environment offering space for interactivity, socialization and communication through the use of atmospheric cues that appeal to the senses. How the physical store will evolve in the future is the research gap that this study aims to address, which is elucidated next.

3. Methods

Adopting an exploratory approach, this paper aims to develop a clear understanding of the different ways in which the physical fashion store will evolve in the future within omnichannel retail and to identify the prerequisites of the designed retail environment in optimizing customer experience. According to Denzin and Lincoln (1994) qualitative research includes the study of natural real-life settings, a focus on participants' meanings and context, providing insights gained through a process of analysis and data integration. This is consistent with an interpretivist approach, which enables researchers to be more engaged with the world in which we live (Yin, 2015).

The data was obtained using semi structured industry expert interviews which allowed for deeper exploration and discussion of the topic (Silverman, 2014). The discussion guide was built on the literature previously discussed and comprised three main areas: the role of the physical store and its evolution in the omnichannel scenario, the interplay between it and other channels and the role of technology in achieving this and how the shopping experience will evolve in physical settings in the future. In total, 20 industry informants, representing senior directors within retail design, retail experience or technology consultancies and recognized innovative retailers were recruited to take part in the study. Informants were selected using purposive and convenience sampling approaches respectively (Yin, 2015). Table 1 provides details of the companies interviewed. For confidentiality purposes, all names of company respondents remain anonymous and referred to as respondent (R) 1–20.

The interviews were conducted face to face and lasted between 60 and 80 min, with open questions concerning the topics covered. A discussion guide was used during the interviews to direct discussion of relevant topics. Interviews were audio recorded, from which full annotated transcripts were developed. Themes arising were identified, analyzed and categorized and key quotes added, in order to gain interpretive understanding (Miles and Huberman, 2013; Saldana, 2016; Silverman, 2014). Based on a combination of a systematic review of documentary evidence and interview data, eighteen retailers were

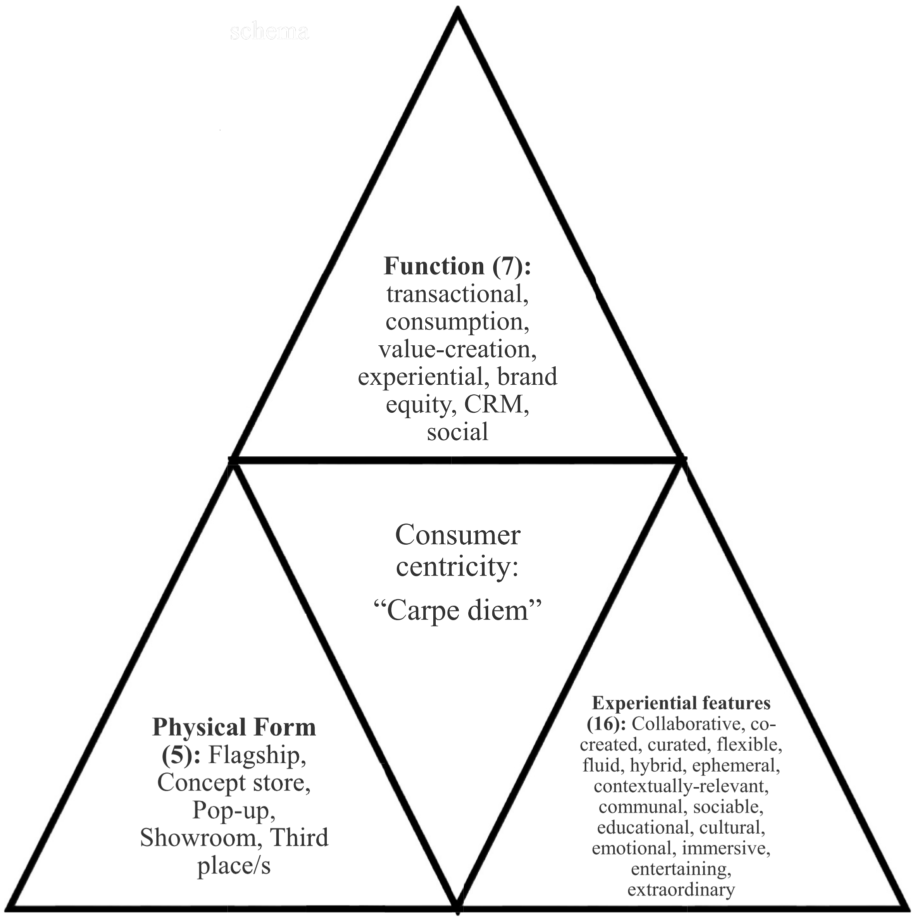

Fig. 1. Physical retail store form-function-experience schema Source: Alexander, 2019 (based on Alexander and Kent (2016); Davis (2014); Kent (2007); Nobbs et al. (2012); Pine and Gilmore (2011); Pomodoro (2013); Sit et al. (2018); Taube and Warnaby (2017); Alexander and Blazquez Cano, 2019

Table 1
Interviewees.

#	Role	Company	Business type
1	Strategy & insights director	Checkland Kindleysides	Global retail design agencies
2	Founder/MD	GP Studio	
3	New business director	Dalziel & Pow	
4	Founder/MD	Mynt	
5	MD	20/20	
6	Chief creative officer	Green Room	
7	Director	Universal Design Studio	
8	Senior design associate	Universal Design Studio	
9	Strategy & insights director	Portland	
10	New business director	Avenue Imperial	Experiential (tech) agencies
11	New business director	Engage Works	
12	Founder/MD	Holition	
13	Founder/MD	The Science Project	
14	Founder	Retail Planner	Retail expert
15	Founder	The Dandy Lab	Experimental retailers
16	Store manager	Story	
17	Head of retail design & development	Aesop	
18	Marketing director, EU	Melisa	
19	Head of brand creative	Jigsaw	
20	Retail visual director	Space 98 (Urban Outfitters)	

identified as best practices of innovative retail stores (from fashion, homeware, and technology). These were used to exemplify and amplify the research results and contributed to the development of the Experiential store futures model.

Given its naturalistic perspective, this study applies Lincoln and Guba (1985) four criteria for demonstrating qualitative research rigor and trustworthiness: credibility, transferability, dependability and confirmability in the operationalization of the study. Appropriate operational measures were adopted by identifying themes informed from the literature in the design of the research instrument which were then consistently applied in each interview (Shenton, 2004) and iterative questioning used to validate opinions during data collection. Moreover, results were examined against extant studies to assess the degree of congruence. Each informant signed a participant consent, ensuring involvement of only those prepared to offer data freely, thereby promoting honesty of response. Lastly, utilizing different data collection methods – documentary evidence and interviews - different informants and different locations until data saturation was reached ensured researcher bias was reduced whilst data credibility and dependability was increased.

4. Results and discussion

4.1. Role of physical store within omnichannel retail

The importance of a physical place was recognized by all respondents in accordance with literature (e.g. Hagberg et al., 2017; Huré et al., 2017). As R1 asserted, *"we champion the need for the physical store as the lifeblood of retail"*. However, five interconnected shifts were

Table 2
Retail format typologies.

Format typology	Retailer example
Showroom	Made.com (online to offline, experiential showroom); Bonobos, Sneaker Boy, Argos (convenience showroom)
Try-before-you-buy (Click & collect outlets)	John Lewis click and collect- no current changing room offer but would transform convenience to experience
Strategic pop-up	Heron Preston 'For you, the World' tour; Ejder, Adidas Originals
Brandship 'bespoke' stores	Gentle Monster; Aesop
Third places	Arket (café); Aesop (writer's room); Melisa (gallery and library); Jigsaw (café); Space 98 (café, restaurant)

acknowledged in the role of the physical store within omnichannel – as brand storyteller, social and cultural experience provider, sensorial giver, community center and human connector.

The store as shared experience, transforming from selling to experiential retail was expressed by all respondents with the store being seen as a source of inspiration and immersion in the brand, as expressed, *"creating live experiences - human connection is important, we are social animals"* (R11) and offering *"experiences you cannot get online"* (R20). For the majority of respondents creating a store environment that people enjoy and want to dwell within was important, which in turns confirms and extends previous research on store atmosphere (e.g. Ballantine et al., 2010; Pine and Gilmore, 1999). Social interaction was deemed critical in relationship development as recognized by Bustamante and Natalia Rubio (2017) and Huré et al. (2017) – the ability to engage with others, to encourage connectivity and community in a digitally driven retail world, as stated, *"you go to the store for social interaction, not to play with tech"* (R5) and, "*we cement ourselves into that community, engage with them, use space to host events"* (R17). The unique ability of the physical store to deliver a multi-sensorial experience – using sight, sound, smell, touch, taste – was seen to elevate its strategic position within omnichannel retail, confirming Alexander and Nobbs (2016) and Spence et al. (2014) theories. Only one respondent recognized the role of the store as contiguous with online. This finding demonstrates that while academic literature emphasizes the importance of the physical store as a hub for channel integration (e.g. Hagberg et al., 2017; Kent et al., 2016; Pantano et al., 2018) the reality appears different.

However, the impact of digitalization was seen as significant in terms of challenging the role and relevancy of physical stores today (e.g. Pantano et al., 2018; Picot-Coupey et al., 2015). As one retailer cited, *"it has thrown everything up in the air - no-one has figured it out yet"* (R19). Whilst it was recognized that retail has and still is being disrupted, all unanimously considered the physical store to play a crucial role in communicating the brand story. Consumer centricity was also identified as a key influencer, with some respondents referring to a "paradigm shift", with consumers digital behaviors dictating change in the function of the store, from a place to transact to a place to be entertained and enjoyed. Localization was recognized as the fourth dominant impact on store design. Rapid growth from online pure-players, shifts towards community retail, and consumer demands for personalization were perceived as driving this.

4.2. Role of physical store within omnichannel retail in the future

The prerequisites of providing a place for human interaction, social experience and storytelling through the senses prevailed in the majority of respondents (e.g. Bustamante and Natalia Rubio, 2017). Supporting sub-themes of creating visibility and being a showcase for the brand reasserts the importance of the physical place in the future. Three further significant themes emerged – the need for retail transformation, retail polarization - convenience.v. experience, and intimate understanding of retail brand and consumer journey. Three of the retailers interviewed stressed the need for retail change as evidenced, *"in future for retail to survive, stores need to be more intuitive and personalized to customers"* (R15); "*traditional retail has stagnated, is defunct. Everyone can do everything online - so how do we get people to store? Why can't stores function like media?..moving, living, breathing"* (R16). They inferred the need for more innovative retail business models, experimentation and agility. The division of retail into either commodification - centered on speed and efficiency (e.g. Amazon Go) - or experience – centered on immersion and playfulness (e.g. Samsung 837) was highlighted by almost half of respondents, which in turn, demands retail format change. The importance of mutually understanding the needs and aspirations of the retail brand and the role the retailer plays in the consumer's life was deemed critical, in order to choregraph the customer journey and create positive memories, as previously discussed (Alexander and Olivares Alvarado, 2017; Blázquez, 2014; Lemon and Verhoef, 2016a,b).

4.3. Physical retail format

Three key themes were prominent concerning the evolution of retail formats: a shift from scalability to appropriateness, traction (i.e. gripping) creating spaces and emerging typologies. The need to respond to the nuance of each store, utilizing a range of formats was asserted, "*the big store format is a challenge now … play with different sizes"* (R5). Most inferred a shift to smaller store footprints, driven not only by digital but their ability to garner customer relationships, build community, flexibility to collaborate within the community and deliver return on investment, *"it's not about size of store but a space that tells a story - everything you design within a space brings it to life"* (R1). Within this, the relevancy of the traditional flagship format was challenged by over half of the respondents, with one retailer asserting that *"the online store has assumed the role of flagship now"* (R19), which challenges Nobbs et al. (2012).

Traction creating spaces (i.e. drawing you in), or what one expert referred to as, *"brand squatting stuff"* (R12) were seen as growing in significance as playgrounds for the brand.

Various format typologies were cited as growing in prominence: showrooms – for convenience or experience; try-before-you-buy (click and collect outlets); strategic pop-ups – potentially displacing flagships; smaller 'brandship' bespoke stores – replacing the large format and 'cookie cutter' approach to retail store roll out and the growth of third places within retail spaces (e.g. Alexander, 2019). Table 2 illustrates the format typologies and examples cited by respondents.

In terms of future retail formats, three additional themes emerged – the transference to fluid retail, format proliferation and polarization, and retail model innovation. Fluid retail encompasses a change in retail place and space. Flexibility and agility in location, store scale, continuous renewal of the retail environment and taking the store to where the target consumer is, were deemed essential, *"digital means we don't need to stock everything … re-modelling existing estate strategies that connects with customers in different ways, in different places is becoming increasingly important"* (R6). This aligns with Botschen and Wegerer (2017). Retailer, Story was used by three experts to exemplify this change. Based in the Meatpacking neighborhood of New York, it functions as an independent store but operates the store as a magazine, meaning it reinvents the entire store every 6–8 weeks, which has positively impacted consumer engagement. As Story highlighted, *"the fact we entirely change 6–8 times a year keeps people coming back to see what we're doing"* (R16).

Format proliferation relates to localization and was deemed an opportunity for retailers to utilize data analytics to target specific product categories to specific customers in specific locations. Department stores creating category specific formats (e.g. beauty) and Ikea, moving away from big box retailing to local high street stores were cited as such examples. As one respondent said, *"no one size fits all anymore – retailer's need to be experimental with formats and see what works"* (R9).

Some experts highlighted format polarization between the powerful pure-players (Amazon, Alibaba etc. – increasingly experimenting with clicks to bricks) and integrity-based independents, with traditional middle market retailers being squeezed. As one expert argued, *"clicks to bricks is refreshing to work with, they don't have same legacy or fixed mindset"* (R6). The entrepreneurial, authentic, personalized and community-based approach of independents was considered to be in resurgence and an opportunity for multiple-format retailers to replicate. Some retail models were mentioned by respondents as innovative ways to reimagine retail: shop-sharing (rent space to others), media-based stores (change like a magazine), co-collaborations (brands conjoin to share space) and community-centers (socialization and experience). As affirmed, *"there is so much innovation, traditional mindsets must change to keep up with new models of doing retail"* (R3).

4.4. Role of technology in the physical store

All experts recognized the rudimentary adoption of technology in store by retailers thus far (Alexander and Olivares Alvarado, 2017; Bell et al., 2016; Blazquez et al., 2014; Hagberg et al., 2017). As stated by R6, *"we have seen executions of digital in retail which have been abhorrent and wasteful"*. Barriers and enablers to technology adoption were identified. The former including issues of high initial and continual investment costs (hardware and software), maintenance, inertia, technology proliferation, drain on energy (and broader environmental impact), application download requirements, customer boredom, business skills and capabilities and general innovation fear factors. As stated, *for Harrods we suggested less tech usage … there are difficulties introducing and managing it - personal human service are more important"* (R2). Conversely, technology enablers cited included the need to educate retailers, staff and customers to show the benefits, and improving service quality and fit with the brand. Within this, technology was unanimously seen within a supporting role in accordance with previous literature (e.g. Grewal et al., 2017; Hagberg et al., 2017; Piotrowicz and Cuthbertson, 2014).

Five typologies of technology's role emerged: entertainment (amplify the sensory experience), servitization (customer service), provide knowledge of brand or product (storytelling), choice editing and fulfillment. The overriding sentiment was using technology in store to either drive convenience or experience, with the majority emphasizing the latter. Speed and efficiency were seen as a given but the utilization of intuitive technology to drive personalization, build relationships, enhance the human experience in store and create an emotional connection was deemed compelling (e.g. Bonetti and Perry, 2017). An important contribution of the research is related to the use of technology to really understand the customer journey, as expressed, *"we're not wanting to use the word 'digital' as a consultancy. For us it's about several things - creating experience, retail efficiencies and the connected customer journey"* (R6).

A few experts posited in store technology as redundant, *"part of the issue is that tech is built by technologists when it needs to be built by psychologists, retailers - human first. I can see a time when there is no digital in-store" (R12)*. This relates to the credence given to analogue (tech-less) stores by some respondents. As one highlighted, *"most successful retailers today don't use in-store technology"* (R17), which is echoed in the choice of best practice retailers chosen by respondents (section 4.8). The human-centered approach to technology was reiterated in the types of consumer-facing technology referenced by experts, "*it's not about one type of tech - that can lead you down a rabbit hole"* (R6), but about utilizing the most appropriate technology to hyper-personalize the customer-retailer relationship, with specifically artificial intelligence enabling this (e.g. Plastino and Purdy, 2018).

A mobile centric approach to technology adoption was seen as most important, as cited, *"most of the impact on retail will be use of mobile as it gives interaction"* (R5), reiterating Shankar et al. (2016) and Fuentes et al. (2017). Augmenting mobile to create mixed reality experiences was seen as the next frontier of customer experience amplification utilizing AR and VR to achieve this (e.g. Pantano et al., 2018). Moreover, the increasing adoption of innovation hubs by retailers was perceived positively, with one expert highlighting that, *"retailers recognize the need for tech so are developing it in-house"* (R15). The need for agile innovation and continuous technology iteration was recognized by some experts, which reveals a trade-off for traditional retailers between delivering short-term ROI and investing in innovation for the long-term.

4.5. Channel integration within the physical store

Credence was given by the majority of respondents to having a customer first approach according to omnichannel retail principles (e.g. Verhoef et al., 2015). This then defines choices around if and what technology to adopt to fit into the customer's life and expectations. Seamless interaction across channels was cited as being important in delivering the personalized customer-centric experience (e.g. Beck and Rygl, 2015; Lemon and Verhoef, 2016a,b). An emphasis on "intuitive" communication enabled by technology to remove the friction in the purchase journey was raised by some. Jigsaw for example, utilize a system called One Stock™ to fulfill orders regardless of which channel the sale is activated in, *"every one of our stores functions as a warehouse and we fulfil orders across touchpoints"* (R19) (e.g. Stein and Rameseshan, 2016).

Some raised the issue of retail sale appropriation legacies as a barrier to achieving integration and the need for change to better match with consumer shopping behaviors across brand touchpoints and channels. A counter-argument was given by a technology expert who posited that omnichannel was about separation not integration, which adds a new viewpoint to the current retail discourse, *"to blur the line is lifting digital up and dropping it into physical which is when you get iPads in store which nobody ever uses. That's not what physical is about … it's about creating frictionful experiences*" – i.e. driving interaction and dwell.

4.6. Customer experience in physical stores

When asked to define customer experience the majority found it difficult. Most interviewees included reference to the customer journey, creating emotional resonance and loyalty through touchpoint interactions, whilst some took the retailer perspective about communication of brand values, which is consistent with the academic concept of customer experience (e.g. Verhoef et al., 2009).

4.6.1. Customer service perspective

Two key reiterative themes were identified – service and experience interwoven and the importance of human interaction. Service was seen as driving retail differentiation by the majority of respondents, with a shift towards a concierge level of service in stores. Some experts perceived service as the future of retail design as exemplified, *"the ritual of customer service is so important. That real human touch – is the future of retail design"* (R1). Credence was given to what was referred to as 'real experience' as opposed to that facilitated by technology, thus restating the importance of human connectivity. The key role of customer service in physical store experience has been previously stated (e.g. Bäckström and Johansson, 2006) but recent literature emphasizes the mediating role of technology as opposed to purely human contact (e.g. Piotrowicz and Cuthbertson, 2014).

4.6.2. Store design/environment perspective

This research makes an important contribution in regard to the store

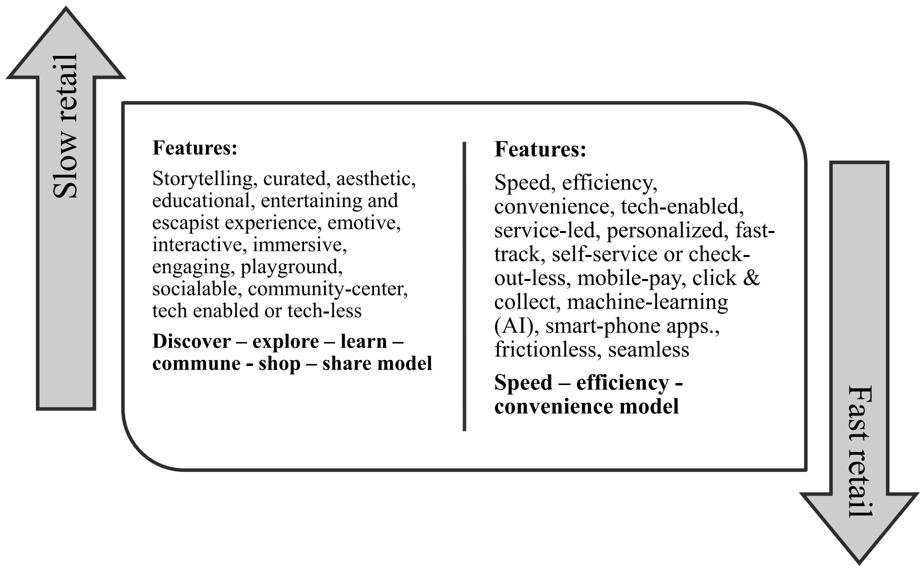

Fig. 2. Slow.v. fast physical store retail model.

design environment, which is especially under-researched in the context of omnichannel retail. The retail design experts highlighted a shift in retail design approach, with a greater emphasis on, *"reason over results"* (R3) and a transference from *"digital to experience designers"* (R6), thus reiterating the importance of the customer experience centric perspective in line with Pine and Gilmore (1999, 2011).

Six features emerged regarding delivered experience via design: brand-led, fluid stores, third places, instragrammable social-stores, curated stores and experientializing neglected spaces. A strategic focus on storytelling to emotionally connect with customers was emphasized, to create, *"magical moments"* (R2). A requirement to understand the brand, brand archetype, its role in customers' lives and intended impact was considered essential to translating this into an appropriate space. The ability of the store to flex and change was considered critical, with an emphasis on agility, integration and entertainment, yet to do so responsibly. This raises issues of environmental waste, an aspect of retail design which has received little attention to date, as asserted, "*the traditional model of 5-10 years for store design, with skipfulls of waste has to change. There has to be better way of thinking about creating spaces to be updatable without impacting the environment"* (R7).

A focus on traditionally neglected zones within retail stores, like click and collect points and fitting rooms, was identified as an opportunity to engage in that moment of trying before buying and to amplify the experience, as expressed, "*decision to purchase happens in the changing room, how we help people make that decision is important"* (R1). The increasing importance of cross-channel facilities such as click and collect has been recognized (Kent et al., 2016; Alexander and Kent, 2016).

Sociable led third places were seen as positively creating consumer traction in store. As one expert stated, *"the boundaries are blurring between what the store space is actually dedicated to – with coffee shops, beauty parlors, educational workshops in store"* (R14). Social-stores (i.e. social media driven) were highlighted as an opportunity to design according to how customers behave online with increasing influence from peers and influencers. The social dimension of physical shopping in terms of creating a space that promotes dialogue between consumers (Huré et al., 2017) is evolving to a different way to do it. Creating stores that reflect social media behaviors will start emerging, *"customers shop via influencers, recommendations, so stores with a 'shop my look' will become important"* (R14).

The need to program spaces and adopt curating practices to elevate the aesthetic experience was considered essential. & Other Stories and Arket were cited as excellent retail examples of curated spaces. A tension for retailers between consistency and cohesion and level of localization and customization was apparent especially given the shift towards more bespoke store design. How to achieve this was seen as a challenge, which is worthy of further research. In any case, it is necessary to keep consistency in brand values and to develop cohesive brand guidelines across channels (Kent, 2007; Kent et al., 2016).

4.6.3. Customer experience futures

Four reiterative themes emerged regarding future customer experiences: agility, leisure operator model, service personalization and consumer touchpoint diffused environments. The need for stores to constantly change, into what was coined, "chameleon" like retailing was echoed by all experts. With retail touchpoint diffusion, driven by digital (e.g. driverless cars, shoppable social media content etc.), the priority shifts to having less but more strategically located physical stores with a clear purpose, proposition and which leverages technology to enhance the experience. Within this, *"total integration will just be expected"* (R4), e.g. smaller stores with an endless isle offer. As one expert expressed, "*access to product will become more diffuse so expecting consumers to go somewhere to buy has to change"* (R13).

The pursuit of a leisure operator model encompasses the demand for heightened entertainment, experience and engagement which reinforces the principles of experiential theories (e.g. Alexander and Kent, 2016; Bustamante and Natalia Rubio, 2017; Pine and Gilmore, 1999, 2011; Schmitt, 1999). Borrowing from the likes of Disney, *"retail will become about selling time … operating as a space to entertain"* (R5) and the product becomes the *"memento"* (R6). Within this, the importance of utilizing brand led third places was seen as growing in importance, to encourage sociability and community, as one retailer expressed, *"the social environment is really important - creating environments where people want to spend time with others"* (R19) (e.g. Alexander, 2019; Alexander and Kent, 2016; Saunders, 2018). This relates to the prediction by some experts of more tech-less stores as social interactions take priority.

Enhancing service personalization was deemed critical by all respondents, using predictive artificial intelligence to deliver a more customized retail proposition, as illustrated, *"the retailer of the future will have a customer database of one -meaning it'll be all about satisfying the needs and expectations of the individual"* (R11). Hyper personalization facilitated by technology was recognized as enhancing either convenience or experience, depending on retailer market level. As one middle market retailer highlighted, *"the Amazon-effect is having an affect – everything is getting faster and more convenient, we need to be different"*. This points to a polarization in retail between what the authors conceptually conceive as slow retail.v. fast retail, as shown in Fig. 2.

Eleven experts predicted retail change as evolutionary, whilst nine saw the need for retail revolution, (e.g. Latchezar and Reynolds, 2015). Those who suggested an evolutionary approach to change highlighted the challenges with traditional retailing associated with legacy systems and processes, rigidity and fixedness of retail stores (leasing models, rates, rents etc.), in approaches to retail operations (seasons, stock holding etc.) and performance metrics (sales based). It was cited that this is where pureplay retailers entering into physical retail have an advantage, *"online juggernauts like Amazon are disrupting and demanding change … if traditional retailers don't respond they'll just die"* (R5). It was also inferred that business environment volatility and fear limits innovation. The trade-off and tensions between reimagining retail and conforming to retail traditionalism was palpable. Some experts expressed a need for both, as stated, *"retailers are frozen in place right now are going to die. You've got to innovate"* (R13).

4.7. Measuring retail performance within omnichannel

Another important contribution of this study, due to the lack of specific research in the area, is the acknowledgment of the growing tension between traditional retail metrics based on sales and new metrics based on experience. As one expert expressed, *"no one has got their head around measuring customer experience yet"* (R6). It was interesting to note that all retailers interviewed still use traditional sales metrics. All experts recognized the challenge attributing sales within an omnichannel environment and the issues of measuring experience. There was no common consensus on metrics used, social media traction featured the most, followed by brand equity measures – return on loyalty, association and awareness, as illustrated, *"it's not about sales per sq. foot but smiles or shares per sq. foot"* (R9). This unresolved question poses an ongoing challenge for all retail stakeholders, summed up by one expert, *"how you quantify the role of the physical space which is driven by experience is very difficult – we have no answer yet"* (R5). Another expert said, *"innovation doesn't have metrics.. it's about risk taking"* (R12). Thus, raising an interesting area for further research.

4.8. Physical retail store best practices

Eighteen physical stores were given as best practices, 11 fashion/lifestyle/sport, 3 tech, 2 homeware and 1 beauty and footwear respectively. Interestingly, over half of respondents provided tech-less (i.e. consumer facing) examples of physical store designed environment best practices, raising questions about the relevancy of consumer-facing technology in store to generate interaction. It also illuminates the importance of analogue brand expressions in fostering customer engagement. Conversely, the technology enabled examples cited demonstrate how technology facilitates the playground experience – promoting test and trial, interaction and engagement over purchasing (i.e. exemplifies slow retail).

The examples serve to highlight two distinct retail approaches. First, convenience – through speed, service efficiency, technology enabled - delivering a more functional experience (evidenced in 2 retail examples). Second, elevated experience – through brand-led design, personality, storytelling, curation, human-facilitated servitization, community-centered, socialization and playfulness (shown in 16 examples). Thus, emphasis was given to more hedonically driven experiences from respondents, suggesting their strategic importance, which supports extant research (e.g. Ballantine et al., 2015; Bustamante and Natalia Rubio, 2017). However, both typologies necessitate understanding the target customer and retail brand. Table 3 depicts these best practice retailers, which are categorized according to retail model (slow vs. fast retail), role, format, designed typology and features.

4.9. Prerequisites of the designed retail environment to optimize customer experience

Seven key components were deemed critical to optimizing customer experience within physical store design: storytelling, curation, experience, location, agility, customer journey touch-point mapping and brand centricity. First and foremost a strong understanding of the brand and its target audience and translating that through the designed environment was considered essential (Kent, 2007). Only then can a compelling narrative congruent with brand values be created. The adoption of curative approaches to store design with the ability to edit and showcase the best of the brand were seen as amplifying the story.

The creation of more modular spaces which enable test, trial and iteration was considered important or what was asserted as, *"in constant beta mode"* (R9 and R15), which is consistent with the need to develop more flexible spaces, agile to respond to customers' demands (Alexander and Blazquez Cano, 2019). This notion of agility also related to store location, utilizing a variety of formats to enable flexibility of place (not just space) and engaging with the local community through design.

Moreover, greater consideration to customer journey touchpoint mapping was prioritised by many experts, referred to as, *"tracking mindsets and missions"* (R5) (e.g. Lemon and Verhoef, 2016a,b). The ability to navigate the consumer emotional journey, tracking the highs and lows, interaction points and reflecting that within store design was deemed critical. Literature stresses how critical it is for retailers to know which parts of the customer journey impact on attitudes and behavior and which encounters are not working well (Baxendale et al., 2015). The potential of artificial intelligence in enabling this was highlighted by some, supporting Plastino and Purdy (2018), albeit the retailers interviewed acknowledged that they had no current systems to achieve this, *"we've got a lot of catching up to do"* (R19).

5. Conclusion, implications and future directions

Collectively, the study proposed significant shifts in the function and characteristics of the physical store within omnichannel retail, reimagined as a community and connected axis – a playful place for social, cultural and educational interaction and converging channel experiences. This in turn impacts retail design and format evolution, giving rise to opportunities for experimentation with more compact but impactful places (see Table 2).

The 'slow retail' model is conceived to emphasize the polarization between slow and fast retail experiences. The former encompassing flexible, multi-functional, curated, personalized, immersive and integrated designed environments (see Fig. 2), as opposed to 'fast retail'. There are some parallels between slow food and slow fashion and our conceptualization of slow retail, as both began as a reaction to fast culture (Fletcher, 2010; Jung and Jin, 2016; Stefko and Steffek, 2018). Characteristically, slow retail shares a focus on localization, pursuit of pleasure, convivial experience, diversity, quality and slowing-down (Jung and Jin, 2016; Stefko and Steffek, 2018; Tencati and Zsolnai, 2012) as opposed to fast food, fast fashion and fast retail that emphasize standardized and homogenized efficiency, rapid response, convenience and speed (Fletcher, 2010; Jung and Jin, 2016). It is the idea of slowing down and dwelling longer in pursuit of experiences in retail stores where they converge. Both slow and fast retail have their place, but significantly, our research findings accentuates slow retail.

The retailers cited as best practices of designed store environments (see Table 3) reiterate the credence given to elevated experiences, which represent the slow retail model characterized by discovery, explore, play, commune, learn, shop and share. These dimensions are encompassed in the conceptualization of the Experiential store futures model, which proposes four forms of designed spaces: storytelling, fluid, digital zones and community center, as shown in Fig. 3. Four concentric circles emanate from slow retail in the middle, the four space

Table 3
Best practice retailers' characteristic.

Retailer	Sector	COO	Retail model	Role	Store format	Designed typology	Features
Made.com	Homeware	UK	Fast/slow	Experience/ convenience	Showroom	Storytelling	Tech enabled - self-service, QR codes, tablets, digital screens; memento's, curated, flexible, playground, sociable.
Merci	Fashion & home	France	Slow	Experience	Concept	Storytelling	Tech-less, curated, programmed, social, collaboratory, local, showcase, third places (café, exhibitions)
Argos	Homeware	UK	Fast	Convenience	Showroom/C&C	n/a	Tech enabled – tablets, fast-track service, pay & collect points, free wifi, self-service, seamless
& Other Stories	Fashion	Sweden	Slow	Experience	Multiple	Storytelling	Tech-less, curated, storytelling, homely, social media 'shop-the-look', lifestyle, eclectic.
Arket	Fashion	Sweden	Slow	Experience	Flagship	Storytelling	Tech-less, 'breathing-space' relaxed, curated, functional, fresh, ordered, simple, social, Nordic, sustainable, timeless, third place (café)
Patagonia	Outdoor	USA	Slow	Experience	Brandship	Community center	Tech-less, programmed, social, community, connected, contextually-relevant, values-led, co-created, third places (communal, workspace, café)
Selfridges	Various	UK	Slow	Experience	Department store	Storytelling	Programmed, energetic, innovative, social, cultural, sensorial, showcase, storytelling, bespoke, third places
Aesop	Beauty	Australia	Slow	Experience	Brandship	Community center	Tech-less, sensorial, local, social, community-led, cultural, hosting, intimate, third places (writers room)
Story	Fashion lifestyle	USA	Slow	Experience	Brandship	Fluid	Tech-less, agile, fluid, immersive, interactive, co-collaboration, retail-as-media-model
Space 98	Fashion lifestyle	USA	Slow	Experience	Concept	Community center	Tech-less, local, community-led, social, third places (café, restaurant) branded pop-up's, eclectic
Nike	Sports	USA	Slow	Experience	Flagship	Storytelling	Tech-enabled, try-before-buy, interactive, exciting, playground, showcase, curated
B8ta	Tech	USA	Slow	Experience	Flagship	Community center	Tech-enabled, try-before-buy, playful, interactive, immersive, co-collaboration, shop-share.
Apple	Tech	USA	Slow	Experience	Flagship	Community center	Tech-enabled, experiential, educational, social, community, relaxing, exciting, immersive, playground.
Samsung 837	Tech	USA	Slow	Experience	Showroom flagship	Community center	Tech-enabled, playground, sensorial, social, sharing, interactive, try-before-buy, engaging, personalized
Blue Mountain School	Fashion, food, home	UK	Slow	Experience	Concept	Storytelling	Tech-less, programmed, curated, exclusive, personalized, local, collaboratory, artistic, luxurious
Dandy Lab	Fashion lifestyle	UK	Fast/slow	Experience	Pop-up	Fluid	Tech enabled, tech-testing, fluid, immersive, interactive, personalization, lab, collaboratory, shop-share
Melissa Galeria	Footwear	Brazil	Slow	Experience	Concept	Storytelling	Tech-enabled, aesthetic experience, cultural, third places (library, gallery), curated, collaboratory, showcase, storytelling
Jigsaw (Shop at Bluebird)	Fashion	UK	Slow	Experience	Concept	Digital zones	Targeted tech (digital fitting rooms), social, cultural, sharing, third place (restaurant), playground, showcase.

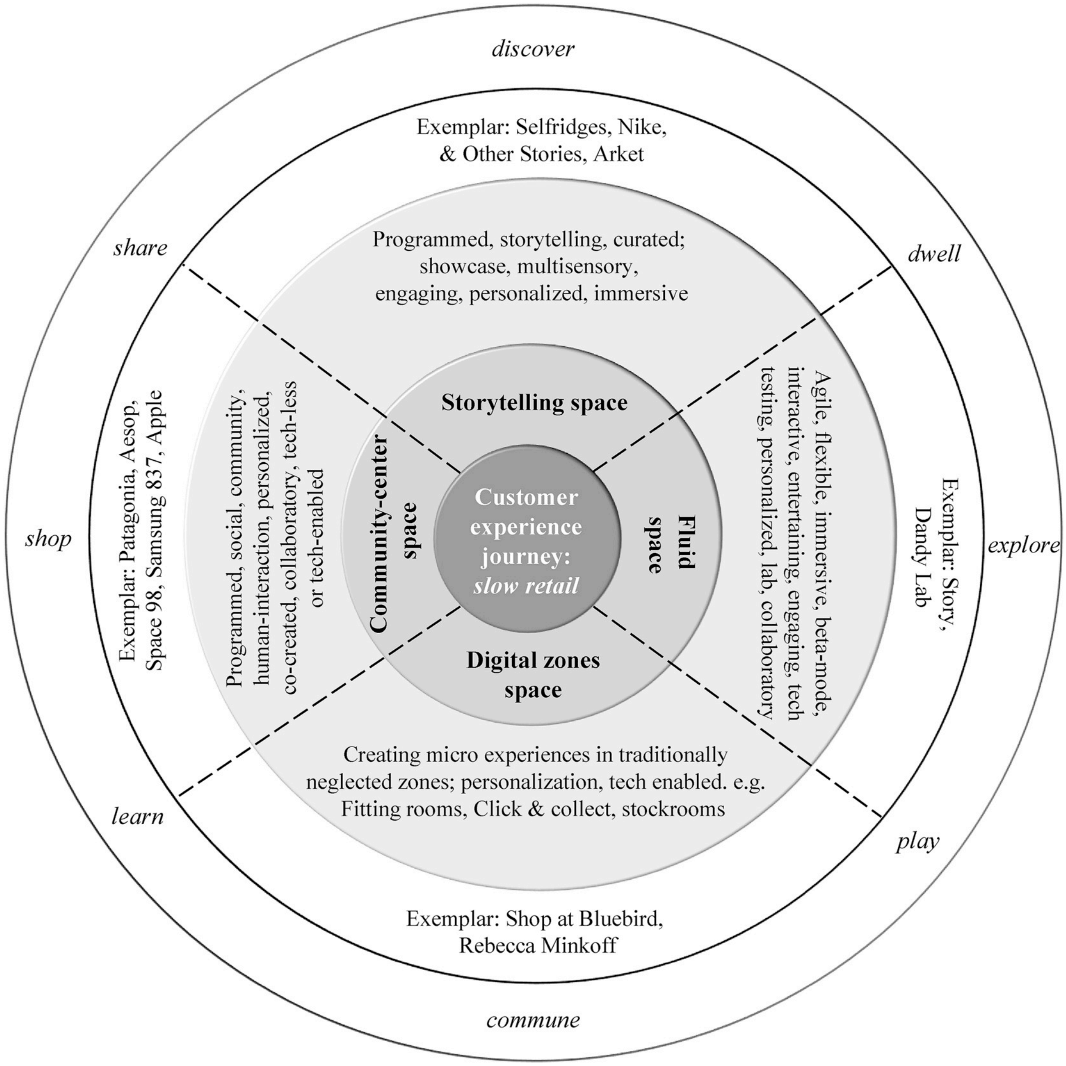

Fig. 3. Experiential store futures model.

typologies, typology characteristics, examples given for each space (by the experts) to the outer circle featuring common facets shared by all related to slow retail (as depicted in Fig. 2).

1. *Storytelling:* This space is programmed to personify the brand in a 3D form. It embraces storytelling and curatorial practices to showcase its identity.
2. *Fluid:* This space embraces agility, changeability and iterations, characterized as being in 'beta-mode' (like software, always in test and trial). It is a space for experimentation, tech-testing and immersive experiences.
3. *Digital zones:* These are in store experiential micro spaces in traditionally neglected areas that utilizes technology to deliver customer experience e.g. Smart fitting rooms.
4. *Community center:* This space is programmed to drive community, socialization and dwell. Often co-created and human-interaction centered, they are either tech-less (e.g. Patagonia) or tech-full (Apple).

The model offers a practical lens into the typologies and factors for consideration when designing future physical retail environments to optimize customer experience.

The originality of this study is that it addresses an underdeveloped scholarly field of study through the analysis of experts' assessment of the role of the physical store within omnichannel retail. It serves to advance knowledge of the physical store within an omnichannel context by providing new findings in terms of format, role, characteristics and integration with other channels and its future evolution. It also raises several tensions and trade-offs for retail stakeholders to consider regarding physical store future decision-making.

The physical retail store is reimagined and reinvented to harness changes in consumer consumption and expectations. The experiential store futures model serves as a practical framework for retailers and retail design agencies to assess the prerequisite factors for consideration to inform future designed environments and optimize customer experience.

The exploratory nature of the study limits the generalisation of results. The sampling was limited in size and scale and prioritised design-tech agencies over retailers. There is merit in expanding the number of retailer informants in future research. Moreover, given the dynamic nature of retail, the model is time sensitive and thus subject to change. Whilst recognizing its limitations, the research does makes a valuable contribution to the dearth of extant academic literature on the prognostication of the physical retail channel, specifically within the fashion sector. By connecting three topics of academic research: omnichannel retail and the role of the physical store with customer experience, it serves to suggest the perquisites for designed environments to improve customer experience. In future research, incorporating a consumer perspective to determine consistency between expected experience requirements and actual would prove an interesting extension. Moreover, the study revealed a number of retailer best practices, interrogating these further through a case study approach would be a worthy addition. Various future avenues for research are elucidated from the study, including exploring the use of artificial intelligence in amplifying service personalization, examining new metrics for measuring retail performance in experience dominated omnichannel retail, the environmental impact of store design, the issues of store design standardization versus localization, the opportunities and challenges of operationalizing agile innovation in retail designed environments and the applicability of innovative store format typologies and new retail models.

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