

TURNING CHALLENGES INTO OPPORTUNITIES DURING THE COVID-19 PANDEMIC: FIELDNOTES FROM “PEOPLE IN RETAIL”

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Keywords

Retail; People; Flexibility; Covid-19; Frontline employees; Pandemic Crisis.

Introduction

Following the spread of the COVID-19 pandemic and the release of strict containment measures in many countries, people's daily lives have radically changed: entertainment, work, social interactions, and even education are now vehiculated through the screen of a PC, notebook, or smartphone. Even the way people make purchases has changed, the shopping experience is very different from the near past. Customers must queue in front of stores, follow purchase limits per item, follow the floor signage, wear masks, keep distance from other customers and store staff, and so on (Martin-Neuning & Ruby, 2020). It is not surprising that in this scenario - characterized by restrictive measures and new rules - many consumers shifted their preferences from brick-and-mortar retail to e-commerce. As significant examples, in the US the share of e-commerce in total retail increased by 4.3% between Q1 and Q2 2020. A similar trend was recorded in the UK, where the share of e-commerce in retail increased significantly from 20.3% to 31.3% in the same period (OCED, 2020). Furthermore, some forecasts suggest that e-retail will account for 22 % of total retail sales globally by 2023 (Statista, 2020).

However, it can be argued that such a trend was characterizing this sector also before the pandemic. E-commerce was already increasing as a share of total sales before COVID-19 (OCED, 2020), and, to add to this, data prior to this epidemic suggested that 70% of all consumers began their consumption experiences with “webrooming” (*i.e.*, looking at products online before going into physical stores; Aw, 2019). To describe this scenario mainstream media began to write about “retail apocalypse” – *i.e.*, a neologism denoting the decline and death of brick-and-mortar stores. (Kaufinger & Neuenschwander, 2020).

Nonetheless - even after the COVID-19 odyssey and the "prophesied" retail apocalypse (Bhattarai, 2019; Morris, 2019; Thompson, 2017) - most of the transactions occur in physical stores (OCED, 2020). Several scholars support the hypothesis that there is no retail apocalypse (*e.g.*, Mende, 2019). The “simplistic” explanation is that the retail landscape is evolving, and retailers that will not follow this evolutionary trend, will become obsolete and fail (Morgan, 2018).

Purpose

COVID -19 caused a shift in the evolutionary trend in retailing, from incremental to more transformative (Dannenberg et al., 2020).

This paper aims to shed light on the transformations that will take place in the retail sector in the near future, focusing on the relationship between the human factor and technology. More specifically, due to their relevance in maintaining and managing customer relationships in the "cross-channel" situation caused by the pandemic, our main hypothesis is that frontline employees are among the top priorities, if not the top priority, of retail organizations. We have adopted a qualitative approach based on researching and conceptualizing the thoughts, opinions and experiences of those who have experienced the pandemic crisis at its worst.

Conceptual framework

The human factor can be considered as a strategic asset for retail companies. Remarkable studies have been written about the importance of frontline employees in shaping the customer experience (*e.g.*, Morhart et al., 2009). As the human component of the sales process, customer-facing personnel act as a catalyst for customer affection and trust, which triggers feelings of connectedness and loyalty in buyers, thus contributing to a firm's success. Thus, it is not surprising that several authors emphasise the importance for retail firms to attract, recruit, and retain competent employees (*e.g.*, Chung et al., 2012). In particular, employee retention should be considered as a crucial aspect for these companies. High employee turnover is one of the most salient problems in the retail industry (Park et al., 2021), and it is in the characteristics of this work environment - including the difficulties arising from constant and changing customer demands and long working hours (Booth and Hamer, 2007) - that the reasons for this should be sought.

Technological implementation

The pandemic COVID 19 created additional stressors for frontline workers, elements that are quite capable of lowering morale and triggering negative feelings. These can include the 'rushed' implementation and 'forced' use of technology. It is certainly true that digital transformation has progressed at an unprecedented pace during the pandemic - across all sectors (George et al. 2020), but few have discussed the potential downsides of this development. Previous research has highlighted the detrimental effects that new technology implementations can have on the workforce. For example, such implementations can cause changes in the employee's role and routines (Wiblen et al., 2010), and - if the employee is not open to change or accepting of the new technology - this can lead to lower job satisfaction, higher turnover intentions (Shahreki et al., 2019), and lower organisational commitment (Brougham and Haar;

2018). Thus, this frenetic digitalization can negatively impact retail employees, especially those who are digitally illiterate and lack flexibility.

The evolution of the 'rapport'

To complete the picture, it is also necessary to consider how massive and ongoing technological change will affect the customer-employee relationship. As mentioned earlier, this relationship is the foundation of retail success. Gremler and Gwinner (2000) examined rapport in their study and emphasised the importance of building strong employee-customer relationships and reported how they can influence satisfaction, loyalty, and word of mouth. Confinement measures have drastically altered these interactions, so a sustainable claim is that this element - which can influence overall perceptions of service quality (Gremler and Gwinner, 2008) - has been reduced, if not disappeared. Therefore, it is relevant for both scholars and practitioners to understand how the pandemic has affected employee-customer relationships.

Employees' motivation

Another factor that was greatly affected by the crisis COVID -19 was employee motivation. The pandemic caused a great financial hardship in all institutions. As the stain of the economic crisis widened, workers felt an ever-increasing level of job insecurity and lowered institutional support, which caused them feelings of stress and demotivation. The retail sector was fully caught up in the global crisis, which inevitably triggered strong feelings of insecurity and uncertainty - particularly among staff with customer contact. The impossibility of predicting the extent and timing of the pandemic further exacerbated the situation. As previous studies have shown, job insecurity is closely related to job satisfaction and motivation, and high levels of uncertainty inevitably lead to undesirable behaviours and higher turnover intentions (Reisel et al., 2010; Lee and Jeong, 2017). Thus, financial and job uncertainty and lowered insitutional support may have caused demotivation among retail employees, which in turn may have negatively affected their job satisfaction and performance. Moreover, it is also relevant to understand how the digital tools and human factor will interact in determining customer satisfaction in the post-pandemic scenario.

Methodology

To reach the proposed goals, three different focus groups were organized to gain insight over the changes that will affect retail in the future. Due to the COVID-19 pandemic, face-to-face meetings were not possible, so the focus groups were conducted online. Online focus groups not only save time and resources but also allow for automatic and accurate storage of discussion data. The focus groups were composed of five/six individuals each and spanned over three weeks. Four moderators were present in each session.

All participants (n = 16; 87,5% male) were employed by different companies. The first group consisted of 5 individuals who worked as store managers. The second group included 5 individuals who worked as HR managers. The third group consisted of 6 top managers/CEOs. So, each group was composed of people belonging to similar organizational levels. Still, the differences between groups would allow the obtainment of different perspective over the discussed topics. Information about the participants can be found in table 1.

Tab. 1: General Information about the participants.

	Focus Group	Role	Industry	Firm Size
Participant 1	1	Store manager	Automotive	> 500 employees
Participant 2	1	Store manager	Pharma	< 100 employees
Participant 3	1	Store manager	Fashion	< 100 employees
Participant 4	1	Store manager	Home Accessories	> 500 employees
Participant 5	1	Consultant	Consultancy	< 100 employees
Participant 6	2	HR Manger	Healthcare	> 500 employees
Participant 7	2	HR Manager	Beauty	> 500 employees
Participant 8	2	HR Manger	Banking	> 500 employees
Participant 9	2	HR Manger	Fashion	100 – 500 employees
Participant 10	2	Marketing Specialist	Fashion	100 – 500 employees
Participant 11	3	Commercial Director	Beauty	< 100 employees
Participant 12	3	CEO	Food	> 500 employees
Participant 13	3	Country Manager	Beauty	100 – 500 employees
Participant 14	3	CEO	Entertainment	< 100 employees
Participant 15	3	CEO	Consultancy	< 100 employees
Participant 16	3	CEO	Consultancy	< 100 employees

A semi-structured protocol with minimal supervision was used for the interviews. Participants were free to intervene during the other responses to add weight to the discussion or to emphasize certain aspects they felt were important. In addition, the moderators asked additional questions when further clarifications from the participants were needed. Each focus group lasted about two hours.

Participants were asked to respond in alphabetical order to 4 different and open-ended questions. Questions were formulated through a Delphi antecedent to the workshops and refined in consultation with all authors and with some experts with several years of experience in retail. The questions were related to I) the problems due to the occurrence of the pandemic COVID-19, II) the support that the company provided to the employees in the stores, III) which skills were the most valued in times of pandemic, and IV) what the opportunities in the post-COVID-19 scenario will be.

NVivo 12 software (QSR International) was used to analyse the data collected. A thematic analysis was carried out. An open coding approach was adopted. The information was coded freely into several emerging sub-themes and then these were aggregated into main themes. The data processing was carried out repeatedly until general agreement around the coding was reached among all the authors.

Findings

From the aggregation process, three themes have emerged, these concerned: I) the problems and critical shifts caused by the spread of the pandemic and the support provided by companies, II) which competencies and skills were most valued during the pandemic, and III) which opportunities and changes will characterize the scenario after COVID-19. As one may notice, the first two questions collapsed in a unique main theme.

Problems and Critical shifts caused by the pandemic.

In the first focus group (*i.e.*, store managers), when asked what problems were caused by the pandemic and how they encountered them, one participant stated that he felt “*like a firefighter putting out as many fires as possible*¹.” In general, most of the problems were related to the ability to ensure a safe environment for customers, but that the solutions chosen were related to the specific sector in which the company operated. As a relevant examples, those who worked in the automotive sector chose a solution based on “*two cars with radios to ensure contact between the customer and staff*” to ensure a safe process for customers. Those who worked with small shop areas were forced to introduce “*shifts between staff*” and have customers queue outside the store to respect the maximum internal capacity. Those who sold disinfectants struggled with the “*enormous traffic [of customers]*” and had to respond with frenetic work by staff who were “*busy in meticulously disinfecting sales tools [...] and constantly making announcements about safe distancing*”. To ensure customers’ safety and be compliant with the new regulations, operators had to implement various solutions.

There was consensus on two aspects: I) the pandemic forced companies to implement innovative solutions and II) higher customer conversion rates.

Regarding the first aspect, most companies implemented digital technologies to ensure service continuity and fulfil customer requests remotely. For example, one clothing firm developed a digital system that allowed customers to “*rate the wearability and fabrics*”. Others implemented digital platforms to allow customers to book their appointments remotely, create virtual tours, and so on. In general, each sector had its specific problems, and to solve them, digital technologies were used in different ways.

The second aspect on which there was general agreement was a higher customer conversion rate. One of the participants confirmed, “*What’s interesting is that the people who came in had a very high interest*”, and therefore “*the conversion rate went up in inverse proportion to the traffic in the store, which went down*”. In summary: fewer customers, but much more interest in the product.

For participants in the second group (*i.e.*, HR managers), the most important issue was ensuring a safe shopping environment, not only for customers but also for employees. As one participant put it, it was about “*reassuring, reassuring and reassuring again*”. And to achieve this, participants emphasized the fundamental role of digital technologies. In practice, most companies were forced to build or expand their digital channels to ensure continuity of service.

The topic of motivation also emerged during the session with these focus groups. A participant stated that the employees were “*tired and disillusioned*”. About this, it is worth mentioning that a firm addressed this problem by creating an “*internal newsletter*” aimed at creating a motivational storytelling around what was happening inside and outside the firm. Such procedure was declared a success since this newsletter had a “*very high opening rate*”.

¹ All direct quotations were directly translated into English by the authors.

In addition, two other relevant aspects crystallized in the discussion: people's desire for social connection and a higher customer conversion rate. Regarding the first point, most participants agreed that after the first quarantine period (i.e., March 2020 - May 2020), "people wanted to go outside and seek social contact" and shopping was a way to achieve this. However, this meant problems as "the rules [for people] were not clear. Therefore, it was difficult to enforce them without being obstructive". On the second aspect, participants in this focus group also emphasized a higher conversion rate among customers. As one of the panellists noted, "we found that obviously fewer people came, but the conversion rate was much higher. The conversion rate was 4% or 5% higher than the year before". So, people wanted out and were willing to spend money, even if it was quite a challenge for businesses to deal with the mass of people and - at the same time - comply with the law.

From the discussion of the problems with the third focus group (i.e., top managers), similar aspects to the first group emerged to some extent. As mentioned earlier, the main problem was to ensure safe shopping and different solutions were adopted depending on the business to comply with the new laws. The massive use of digital tools was also reported in this group.

However, two aspects were strongly emphasised by the participants of this group: employee motivation and employee digital skills. In terms of motivation, for many staff the quarantine meant foregoing full pay, so "when it started again, the general climate [motivation] was very bad". The situation was dire. The lack of financial security and forced disengagement from routine caused a "pretty negative emotional and existential state". As a result, motivation was low and even when things got back on track, employees felt let down by the company. Another problem that emerged during the discussion with this third group was related to employees' digital skills. Several participants reported situations where "customers were way ahead in using new technologies [compared to employees] and therefore it was impossible to guarantee the same kind of shopping experience or convey the same professionalism". In summary, unmotivated employees and lack of digital skills were two severe problem areas for top managers.

Fig. 1: Word frequency cloud of problematics node.



Most valued skills during the pandemic.

The second question asked during the focus groups asked participants what skills and competencies are most valued in times of pandemic. Most participants in the first focus group (i.e., store managers) cited flexibility as the most important skill to respond to the challenges of the pandemic COVID -19. One participant noted, "it was a matter of pure flexibility. Even before the pandemic, which will become the 'B.C.' of retail, we had an e-commerce channel [...] but now everything is online. So, to do not lose sales, we had to move from physical to

digital, and that required flexibility". Thus, the ability of staff to adapt to new technologies and the contingencies of the pandemic was by far the most valued. Flexibility was important because most firms were adding or expanding "a layer of technology (e.g., a digital channel) between employees and the customer", and if employees didn't have the flexibility to learn how the tool worked, it just added "additional friction and slowness" to the whole process.

Another theme that emerged during the discussion with this first group related to soft skills: problem-solving, proactivity, curiosity, creative thinking, and others were mentioned by participants. They were considered important as they are fundamental for reorganizing activities in times of legal constraints.

Similarly, in the second group (i.e., HR managers), a general agreement was found on the importance of flexibility. One participant confidently stated that "traditional selling will no longer be there. [...] What we need today is to adapt to the situation and to the context". In terms of future trends, another panellist predicted that "the new normal will be a bit more Darwinian. You either adapt or retail is not for you. And those who resist change will probably lose".

Flexibility was also evident in the third focus group (i.e., top managers). Indeed, the pandemic situation required employees to "change jobs four times in one day" and consequently, "those who had the ability to successfully deal with different and unforeseen situations stood out more than those who look at the numbers". In summary, flexibility was highlighted by the whole group as a key skill that will be increasingly required of retail employees in the future.

Fig. 2: Word frequency cloud of competencies and skills node.



Changes and opportunities of the post-pandemic times.

The fourth and final question asked during the focus groups related to the opportunities and changes that will occur in the post-COVID-19 scenario. In response to this question, the participants of the first focus group (i.e., store managers) and the second focus group (i.e., HR managers) emphasized that the pandemic has made retail personnel much more aware of the importance of customers to brick-and-mortar stores. As one participant noted, "the big takeaway from the pandemic is that staff are now aware that those on the other side of the counter, who are often a nuisance and often come in ten minutes before closing time [...] are the very ones who keep this big circus [retail] going". In the future, retailers must be able to satisfy customers by providing them with a "fluid shopping experience" based on a "perfect integration between the physical and the virtual tools". Another focus was on the enormous digitization process that will occupy the retail industry in the near future. Before the pandemic, "the goal of integrating digital technologies into the store or sales process was to create a wow experience". Post-pandemic, technology integration should instead have a social connection value, aiming to "create relationships and bring customers closer". However, such integration between physical and digital should not be done blindly; it is necessary to "understand what

technologies are needed to satisfy customers". Thus, for most participants, the key to success lies in the ability to tailor a fluid shopping experience to the customer, where "barriers [between digital and physical channels] are completely broken down and employees are seen as fundamental levers".

Fig. 3: Word frequency cloud of changes and future opportunities node.



As for the third focus group (i.e., top executives), discussants focused more on the changes affecting retail than the opportunities created by the pandemic. The challenges for this industry are to be able to answer the question of why a customer should *"get off the couch and go somewhere to buy something they can buy from the couch without wasting energy and maybe even saving some money"*. *"Retail Entertainment"* may become the new dogma in the future. To offer such an experience, companies need to consider two basic aspects. The first is to listen to customers more. CRM systems will be essential for this as they enable a one-to-one relationship. *"Talk to people as people"* is how trust and loyalty can be built and customer retention rates increased. Second, digital tools must *"become means to enhance the shopping experience"*, but the core must be the employees. The employees have to be considered a mean through which brick-and-mortar can diversify itself from online stores. The implementation of digital means, instead, must be aimed at creating a unique and fluid shopping experience in the store.

Figure 3 shows a word frequency cloud of the third main theme about the opportunities and changes that will occur after the pandemic.

Contributions

Through a qualitative approach, this study provides an overview of the perspective of those who work in the retail business. Important insights emerge from the study both in terms of the skills retailers need to cultivate to better adapt to the challenges of the future, as well as the opportunities that arise, particularly in terms of technology integration, employee-customer relationships, flexibility, and technology literacy among store personnel. Table 2 summarises the salient aspects that emerged from the analysis.

Tab. 2: Synthesis of the knowledge gained in the discussions.

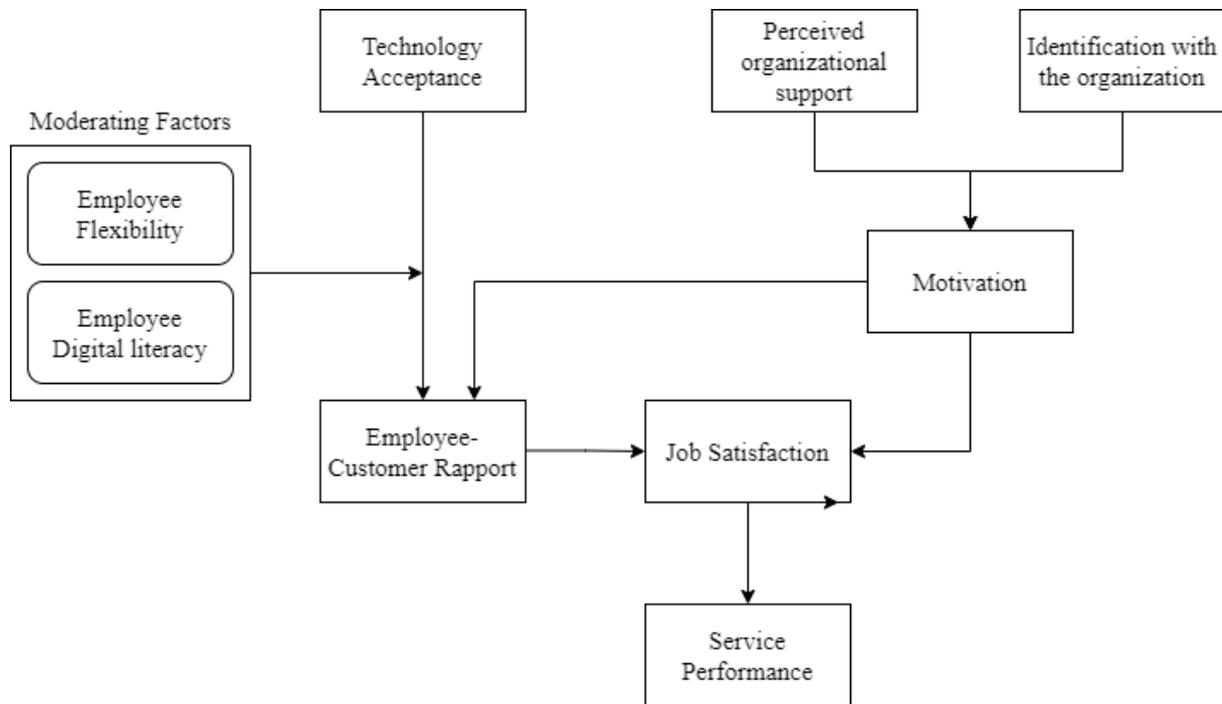
Themes	Focus Group I	Focus Group II	Focus Group III
Problems and critical shifts caused by COVID-19	Provide a safe shopping environment Different businesses, different solutions adopted. Higher conversion rates.	Provide a safe shopping environment Reassure customers and employees Implement technology based on digital technologies. Higher conversion rates. Low motivation of employees. Customers looking for social connections.	Provide a safe shopping environment Different businesses, different solutions adopted. Low motivation of employees. Low digital skills employees.
Most valued skills during the pandemic	Flexibility, in the sense of being able to adapt to the volatility of the context. Soft skills.	Flexibility, in the sense of being able to adapt to the volatility of the context.	Flexibility, in the sense of being able to adapt to the volatility of the context. Soft skills.
Opportunities and future changes	New sensitivity to the importance of the customers. Integration of physical and digital tools to ensure a “fluid” shopping experience.	New sensitivity to the importance of the customers. Integration of physical and digital tools to ensure a “fluid” shopping experience.	Integration of physical and digital tools to ensure a “fluid” shopping experience. Strive to create “retail entertainment” experiences. Enhance the diversifying role of the employees using digital technologies.

This study highlights three fundamental themes in its contributions. First, the 'forced' digital transformation caused difficulties for some employees: those who lacked flexibility, digital and soft skills found it difficult to adapt to the new realities. Second, participants affirmed the primary role of 'rapport', claiming that when activities began to open up a little, people entered them; motivated not only by shopping reasons, but also by a willingness to engage socially (Gremler and Gwinner, 2000; 2008). Thirdly - as expected - the period was characterized by very low levels of employee motivation. This was determined by the uncertainty - on several fronts - caused by the pandemic (Reisel et al., 2010; Lee and Jeong, 2017) and in certain cases a decrease in perception of institutional support.

Therefore, by conceptualizing the aspects that emerged in the analysis, the following theoretical model is proposed (Fig. 4). In it, technology acceptance and perceived organizational support are related to job satisfaction and thus service performance through the mediation of employee-customer relationship, which results in and influences the overall store climate and employee motivation. The relationship with technology is moderated by two factors: Employee flexibility and digital literacy. The higher the latter two factors, the easier it is for the employee to adopt and properly use a new technology, resulting in a higher quality customer relationship and lower "process frustration." The second relationship involves the elements of perceived organizational support and identification with the organization and motivation. When the former factors increase, employee motivation also increases, which in

turn leads to higher job satisfaction and performance. Since it is important that the employee is enabled to develop an appropriate relationship with customers, motivation as a subjective factor also influences the quality of interaction with customers and the relationship that is established.

Fig. 4: The proposed theoretical model



Practical implications

Many practical implications arise from the current investigation. As previous research has shown, frontline staff are a critical factor when it comes to service excellence: customer perceptions and overall service ratings are quite dependent on how staff perform their duties (Morhart et al., 2009).

After the pandemic, a new form of retailing will emerge, and skills appropriate to the new context will be needed on the front lines of business. In the discussion, flexibility and soft skills emerged as key to ensure continuity of services: as the pace at which digital technologies are implemented in retail increases, these skills will be needed more and more. New technologies will be needed by employees to properly serve customers in the new retail environment and avoid additional friction in the sales process. Therefore, managers - and especially HR managers - will look for these skills when selecting staff or invest in training them. On the other hand, companies need to take measures to increase employee motivation (e.g. motivational newsletters, motivational courses).

Second, shopping is an experience that involves a social component (Dennis et al., 2010), and given the relevance of social mediation today, this is expected to become increasingly important. Taking this into account, using the human factor and, for example, teaching staff to engage with customers in a pleasant and stimulating way can lead to successful performance.

Third, the pandemic has led to customers becoming more accustomed to buying online. Retailers will likely have to invest extra effort and resources to find new ways to appeal to them and get them to spend their money in brick-and-mortar stores. Designing a unique in-store customer experience and "retailtainment" will be a must in order to differentiate brick-

and-mortar stores from their online counterparts and divert traffic to physical establishments. Again, the role of staff will be critical.

Conclusions

The purpose of this study was to examine how companies were able to address the multiple problems as well as the transformative imperatives that arose following the occurrence of the pandemic COVID -19. Because of their relevance to maintaining and managing customer relationships in this era of upheaval, our main hypothesis was that frontline employees were among the top priorities, if not the top priority, of organizations. We had full confirmation that this was true and that the service component, and therefore people management, would have a key role in the future of retail. Following our qualitative research, we have begun to build a model that more accurately identifies the key variables related to managing people that need attention in the current climate. We therefore look forward to continuing this research with a quantitative study.

Research limitations and outlook

The main limitation of the study is that the analysis is based only on a qualitative approach. Second, the sample included participants from a single country; perhaps a more diverse sample could be used to gain additional insight. In addition, conducting a quantitative study that explores the relationships that emerged during the focus group would be highly relevant to both academics and practitioners. Finally, massive technological implementation may also have some negative effects on employee performance (see Brougham and Haar, 2018). Further exploration of this relationship could be highly relevant to understanding future development paths.

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