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**Northumbria
University**
NEWCASTLE

From Global Brand Management
to Localised Spatial Experience
Design: How Global Brands Adapt
their Spatial Experiences around
the World

Amani Ali Alaali

PhD

2023

From Global Brand Management to Localised Spatial
Experience Design: How Global Brands Adapt their Spatial
Experiences around the World

Amani Ali Alaali

A thesis submitted in partial fulfilment of the requirements of
the University of Northumbria at Newcastle for the degree of
Doctor of Philosophy

Research undertaken in the Faculty of Arts, Design and Social
Sciences and in Collaboration with Ahlia University, Bahrain.

January 2023

The Candidate is declaring that the work presented in the submission follows appropriate standards of academic practice, is free of plagiarism, and fully acknowledge opinions, ideas and contributions to the work of others and the work is that of the candidate alone, even when the program is part of a collaborative research project.

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Abstract

The endeavour to make the best use of space, along with attention to user well-being and functional design, have pushed the development of the possibilities of interior design. Advances in both experience design and localisation have brought a major shift in interior design. Global brands use interior design as a touchpoint to connect with their customers. However, experience design and localisation concepts add complexity to using physical spaces as a competitive advantage. Therefore, brand management is needed to help manage these complex layers, attune all the touchpoints and manage the experience as well as authentically localise those spatial experiences.

The aim of this PhD thesis is therefore to explore how brand managers and experience designers in global brand management teams work towards localising their spatial experiences. In order to respond to this, working with global leaders, such as Starbucks, IKEA and others was necessary.

The research reviews literature relating to the three fields of interior design, experience design and brand management in the context of localisation. From this, an iterative methodology was developed. The main studies consisted of preliminary interviews with professionals working in interior design, or brand management and the related fields. This was to build on the lack of empirical data available and to practice interviewing skills. Then from the preliminary interviews it was understood that cases needed to be studied in more details, therefore two cases of successful global brands were investigated in more detail, with a background study, observations and interviews with the design and management teams members. Delphi surveys were then used to invite a wider range of global brands to reach consensus on the findings and clear areas that were still of speculation. The results of these primary data collection methods resulted in key ingredients that needed to be integrated into the design process to better the process of localisation of spatial experiences. These ingredients were reflected into toolkits that were tested in the context of interior design students' courses at Ahlia University, Bahrain.

From the analysis of the data, the outcomes combined resulted in a toolkit that keeps in mind the key ingredients needed to create authentically localised spatial experience around the world. The outcome also considers the challenges that were raised as a barrier to implementing the theoretical information available into practice. These challenges were budget, time, and team distribution related. The toolkits developed therefore bridge the gap between theory and practice that has been a pattern that has been noticed through literature where researchers in experience design and management have noticed and have urged to be brought closer together. The findings are classified in a way that can assist other brands and experience design teams in overcoming shared challenges when it comes to localising their spatial experiences.

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My husband Ali Dairi understood this journey was going to be tough but powered through it with me. He listened to me go on and on about this topic and always pushed me to do better. We have sacrificed a lot, but surely came out stronger.

To my parents, thank you for all that you do, you are an inspiration. I hope I have made you proud.

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Chapter 1: Introduction

1.1 Motivation

The gulf witnessed an oil boom, glass and steel buildings starting being built everywhere over a relatively short amount of time. Living in Bahrain, I witnessed that boom, and while they were nice and shiny, I always felt like they lacked something, as if they did not belong. It seems many local businesses felt the same way, and started to heavily localise their brand.

My interest in the current topic came about from noticing localised design elements with a modern twist, making a comeback through brands in Bahrain. The localisation of the brands started out with local brands and then made its way to global brands, where they started to localise in order to rival local brands.

I subsequently lived in the UK and saw those global brands in a different geographical context, which provided me with a greater appreciation of those localised elements, although some elements were kept largely standardised. This sparked a desire to understand how brands adapt to local environments and why to choose to adapt certain aspects as opposed to others.

Looking at the topic from a design management perspective meant that the findings could affect how meaningful localisation is achieved before its creation. How visitors perceive the brand's spatial experience after it has been created is important to understand how to improve future projects, it was therefore taken into consideration. However, I wanted the findings to be classified in a way to help create better localised designs rather than kitsch designs. Therefore, I wanted to understand where the balance stands in order to be successful.

1.2. Background to the Research

The use of interior physical settings started when people first learned to use shelters as early as 380,000 B.C. (Pile & Gura, 2014). Up until the 19th and 20th century, interior design was practiced primarily by artisans, craftspeople, painters, sculptors and early architects. The term interior design did not appear in general usage until after World War II (Piotrowski, 2013). However, the endeavour to make the best use of space, along with the attention to user well-being and functional design developed the possibilities of interior design. Therefore, interior design moved away from the merely decorative avocation practiced by those who were not

professionals in the field, to a profession based on aesthetics and functions, including a change of structures when required, creating spaces that are attuned to cultures, geographies and the contexts within which they exist (CIDQ, 2020).

This focus on attuning design to geographical and local settings has been echoed in the branding literature (Wollheim and Mola, 2011, Dimofte et al. 2010; Özsoy 2012; Edwards, Sanchez-Mangas, Jalette, Lavelle, & Minbaeva, 2016; Cheon, Cho, & Sutherland, 2007; Pudielko & Harzing, 2007). Brands need to find a balance between sending a coherent message and localising. Both design and branding literatures address the struggle in balancing between the global and local aspects (Zhao & Belk, 2008; Liu et al., 2017; Leonidou et al. 2002; Barron and Hollingshead, 2004; De Meulenaer et al. 2015; Wittner & Thoma, 2011; Ching et al. 2011, Fiss, 2009).

Other than addressing localisation, global brands also have to address another major shift when it comes to designing their physical spaces. As the endeavour to make the best use of space continues to push the boundaries of interior design, the profession faced another major shift with the introduction of the concept of experience design by Pine and Gilmore (1999).

Experience design is moving away from seeing the consumer as looking for an aesthetic reward and instead seeing them as an emotional being. Therefore, it is looking at everything that the consumer interacts with holistically. That includes digital and physical touchpoints, such as online retailing as well as physical spatial settings. In terms of interior design, spatial experience design looks into everything the consumer would come into contact with within the physical setting, both tangible and intangible, this includes physical aspects such as materials, products, marketing, as well as intangible sensory aspects. This results in meaningful brand experiences as they are purposefully designed to deliver the experience through qualities and characteristics of branding.

Even though experiences are subjective, the literature shows that parts of peoples experiences can be designed for. Many scholars, such as Pine and Gilmore, tried to theoretically pinpoint the considerations. Others tried to take Pine and Gilmore's research further. Some scholars

have recommended practical ways to achieve experience design; including human-centred design, and co-creation.

Even though theoretical knowledge exists on how to design for experiences, Wise et al. (2014) noted that although more than 80 per cent of senior managers say that their organisations focus on customer experiences: “85 per cent of firms have no systematic approach to determining what a differentiated customer experience even looks like, let alone creating one” (p.8). Similarly, Gentile et al. (2007) observe that there are many studies focusing on the customers’ experiences but “tools aimed at supporting marketing managers in devising the right stimuli to support an excellent Customer Experience are still scarce” (p.395). Many experience design and experience management scholars echo the same concepts in their work. Experience design authors Hazzensahl and Suri notice a gap in the theory behind experience design and how it is being practically applied in organisations (Hassenzahl et al., 2021; Suri, 2015). Suri introduces tools to help with this gap (IDEO, 2005; IDEO, 2003). While experiential management scholars Rossman and Duerden stated that fully positioning an organisation for success within the experience economy remains a strategic issue that many executives face difficulty solving.

These issues of the application of experience design challenge organisations add a layer of complexity to the application on interior design for global brands and localisation adds another layer of complexity, also in terms of management. The design management literature suggests that the geographical backgrounds, cultural and personal experiences, as well as where the teams are geographically based, all affect the localised design outcome. The management of all these aspects becomes increasingly complex, necessitating tools to help aid the process (Gentile et al. 2007).

While experience design, management and localisation authors argue that these localized experiences can be designed for and managed within the context of global brands, the relationship between the application of localised experience design and how it is managed within global brands has not been fully explored. Little research has been done in developing methods based on the theoretical localisation experience design concepts and employing them

in successful organisational settings. Therefore, I want to understand how global teams adopt these theoretical concepts and practically apply them, then come up with tools that help the process of localising experience designs for global brands.

1.3. Central Topics

a. Experience Design

In the context of the research, the term 'experience design' is used to broadly encompass moving away from seeing visitors of spaces as looking for an aesthetic reward, but seeing them as complex emotional beings. This puts a focus on the multisensory elements of such spaces and how they affect the visitor. This definition is the emergence of the focus on experience, which Pine and Gilmore (1999) called "the experience economy". They observed that at the turn of the 21st century, the nature and progression of economic value was shifting from a focus on material goods, to a focus on services, and a subsequent further shift to customer experiences. Design research addresses the same shifts now in addressing experiences, moving from making material artefacts, to experience and other less "material" forms of making. The shifting foundations of the design disciplines as a result of the impact of the concept of experience design is explained by Sanders and Stappers (2012) who state that until recently, design was primarily concerned with making "stuff". However, they explain that design is moving away from making stuff for people to making stuff for people in the context of their lives.

b. Interior Design

There exist many early accounts of the use of interior design (Pile and Gura, 2013). However, Piotrowski (2013) adds that during the late 19th and early 20th century, primarily artisans, craftsmen, painters and sculptors, and early architects practiced interior design. In the early 1900's, the term "Interior Decorator" was used and most decorators at the time had no academic credentials. They addressed issues such as scale, proportions, and aesthetics within spaces. However, the profession of interior design continued to evolve. As Sanders and Stappers (2012) mentioned, the fact that there were many factors, including looking at the subjects from the experience perspectives, meant that the emerging design discipline is design

for experience or service rather than design for interiors only. This means a more holistic view of spaces. It also means that more than just interior design is combined within a space to make a successful experience. Design fields have to come together to consider a holistic view of the space. As interior design became multi-disciplinary, this affected how design was done. In this thesis, the term used to refer to such evolution in the field of interior design will be “spatial experience design”.

c. Global Brand Management

Maintaining a global brand is very difficult, it requires businesses to take measures to approach the market more proactively, which is what global brand management includes. Experiences and localisation can both add that competitive advantage however, experiential management authors J. Rossman and Duerdon add that experiences can be done superficially or inauthentically, other authors suggest that the same can be said for localisation, (Khan, 2018; Ching et al, 2011). As seen throughout the literature, the brand must consider many layers. This includes different touchpoints and their correlation, multidisciplinary teams, meaningful localisation and experiential qualities, which all have to be considered by the brand within their spatial context in different geographic locations and contexts. Brand management is therefore needed to strategize these different complex layers.

d. Localisation

Many of the recent definitions of interior design from the CIDQ, Clemons and Eckman (2011) and IFI states, it is important that the interiors respond to several aspects including the physical location and the social context in order for the design to support the all the functions of humanity, as belonging to a certain context is one of the functions. Attuning interiors and products culture, geographies and contexts which is what I call localisation in this thesis. In terms of localisation of branded spaces Khan (2018) confirms that global brands may opt for localised retail store design (retail stores that express the place in which the store is designed) as a form of unique retail design that offers an experience that is rooted in a time and place. Localised retail design differs from conventional modes of retail design in that designers source inspiration from both brand and place (as opposed to brand only). Khan (2018) further quotes Van Veen which says “...localisation is about mattering more to people. Globalisation,

digitisation, and urbanisation are dehumanising cultural contexts to which brands must respond.”

e. Design Management

Suri, an experiential design researcher explains that management, in this case design management, is important because design is an important part of any global brand today. Designers may comprehend, shape and communicate new, innovative products and visualise brands, but design always needs to be harmonised and carefully associated with a firm’s approach and core capabilities, as Hands (2008) has emphasised; this describes the design manager’s job. Therefore, design management is the effective way that brands can manage the spatial experience design with all of its components. It has been established that the way design is managed within organizations can have a huge impact on whether a brand succeeds or fails (Hands, 2008; Dutta, 2012; Best, 2010). In recent years, the rising complexity of projects, growing market competition as well as the need to localise, have significantly increased the pressures to improve design performance. Therefore, design management has emerged as a body of knowledge to better understand and tackle some of these issues.

1.4. Research Aims and Questions

a. Research Aims

This thesis has two main aims. The first aim of this research is to explore how brand managers and experience designers of global brands teams work towards localising their spatial experiences to different geographical contexts and settings. The second aim is to develop creative toolkits that can be used when addressing the representatives of global brands in different geographical contexts and settings within spatial design. The outcome will be validated by using a case study in Bahrain, where the suggested creative toolkits will be tested.

b. Main Research Questions

In the process of the research, the following main questions were addressed:

Within the context of globalisation and localisation, what are the interrelations between brand management and experience design?

How could organisations advance their process using creative toolkits for experience designers and brand management teams?

1.5. Thesis Structure

Chapter 1: Introduction

This chapter introduces the researcher's motivations, the research background, central subjects, and the research aims and questions.

Chapter 2: Literature Review

This chapter reviews the literature and existing knowledge regarding spatial experience design, and its relationship to localisation and brand management. This chapter presents a review of the literature and existing knowledge related to the research aim. It serves three interlinked purposes: to explain the context and background of the investigation and locate the research within the field; to identify a gap in the knowledge that this thesis will address; and to identify aspects that may affect design teams addressing the localisation of spatial experiences within global brands. The chapter concludes by identifying the gap that exists in the literature that directed the primary research enquiry.

The literature review offers a number of factors to be considered when designing localised spatial experiences, including the boundaries of experience design and what can be designed for, as well as the benefit of localisation in addressing the boundaries suggested. These observations include gaps in understanding how the process is managed in terms of practical application rather than theoretical investigation. Moreover, there is a lack of overview on how the particulars of adapting spatial experience design are applied to different geographical settings and contexts. This highlights the critical gap in bringing disparate pieces of the different fields of design, experiences, localisation, branding and management together. Finally, there has been minimal focus on the adaptation of design processes to suit experience designs, and specifically for global brands where localisation is an important competitive factor.

Chapter 3: Methodology

This chapter identifies a systematic way of filling the gap identified in the literature review, presenting the methodology and methods underlying the thesis. It begins with a review of the

research philosophies and assumptions and offers justifications for the adopted methodology. The research methods employed provide the systematic means by which the research is conducted, while the methodology provides the rationale and philosophical assumptions that direct the use of those methods. A number of methods have been identified as applicable to achieve the research objectives. This chapter presents research approaches that could be adopted in order to achieve the aims and objectives presented in the introduction. Each part of the methodology is then explained in further detail; the preliminary interviews, the case studies, Delphi surveys, and the development and testing of the toolkit. The chapter also explains an account of the samples involved, the study procedures, and the analysis of the data collected. The chapter concludes by discussing the reliability and validity of the research in supporting the thesis to minimise the number and severity of errors and biases in the studies.

Chapter 4: Towards Understanding the Localised Spatial Experience Design Process

This chapter presents the first stage of data collection and analysis conducted in the thesis. It reports on the preliminary interviews conducted with brand management, design and marketing experts. The preliminary interviews were intended to understand the design of localised spatial experience processes within global brands, both in-house and outsourced. In the end, the main contribution of the preliminary interviews is to make sure that team structures were taken into account in the next stage when recruiting participants, as well as in the questions they were asked. It was also seen through the preliminary interviews that the questions addressing solutions and advancements of the localisation process need to be expanded upon and better linked to the research aims, to help address the issue with the participant in the best possible way.

Chapter 5: From Global Brand Management to Local Spatial Experiences: The cases of Starbucks and IKEA

The previous chapter reported on the preliminary interviews, which provided a starting point for understanding the process of localisation within global brands. My analysis of the preliminary interviews highlighted the importance of localisation and the need for localisation to be more advanced in order to be more meaningful. However, what is less clear from these preliminary interviews is how these brands come to manage the adaptation and integration of their global

brand into geographically and culturally diverse spaces, and the roles of design and organisation. Looking into how two successful brands achieve this will offer an opportunity to understand the practices of design teams and designs role in creating appropriately-localised spatial experiences for global brands. To build on the findings in Chapter 4, this chapter presents the findings from two case studies of global brand management and localisation, focusing on the cases of Starbucks and IKEA. The chapter describes the reason for selecting these companies for the case study, why interviews with people from these companies were chosen, the study participants' backgrounds, secondary resources that led to the formation of questions for the semi-structured interviews, and findings from the interviews with staff from the brand management and design teams of the brands. The chapter concludes with a discussion of the main insights including the value of localisation to the participants as well as the challenges they faced in devising designs over long distances in globally-distributed teams. Finally, the chapter discusses possible solutions to the challenges found within the design processes as outlined by the participants.

Chapter 6: Meaningful Engagement with Locale – Validating the Findings from Starbucks and IKEA

This chapter reports on the third stage of data collection and analysis activities conducted in the thesis - the Delphi surveys conducted with a panel of specialists split into two categories; outsourced and in-house team members of global brands. The chapter explains in more detail the motivations behind conducting the survey, the participant sample and recruitment process, and how the questions for both stages of the survey were formed. The latter part of the chapter reports the findings from the survey. The analysis of the survey data highlighted how panellists confirmed the value of localisation and the need to develop affordable, simple suggestions. These suggestions address some of the issues teams had about designing spatial experiences for different geographical contexts and settings and to deal with the issue of design and distance and promoting meaningful interaction with the locales and contexts from a distance. This chapter concludes with a description of the main contributions that this section provides and examines how these findings will be used to develop the next stage of research.

Chapter 7: Multi-Sensory Localisation Toolkits

This chapter reports on the creative toolkits developed to address the lessons drawn from the previous methods. The chapter explains the findings thus far first, in order to understand what led to the development of the creative toolkits. The development of the creative toolkits is then outlined leading to the explanation of the final creative toolkits. The explanations describe every part of the creative toolkits and what it would be like to use one. After the creative toolkits were developed, they were tested in a series of workshops in the hands of interior design students at Ahlia University, Bahrain. Therefore, the next part of the chapter explains how the creative toolkits were tailored to the contexts that this specific case addresses, who the participants were in the workshops, how the data was analysed, and then reports on the findings of the workshops. This chapter concludes with a description of the main contributions that this section provides.

Chapter 8: Discussion, Implications and Conclusions

This chapter reflects on the research project and discusses its outcomes. It reviews a number of key topics which emerged during the investigation and draws together a set of dominant themes and considerations highlighted. It also considers the implications and importance of the findings and how they relate to existing knowledge.

The final section draws together the conclusions and findings presented in the previous chapters to discuss their significance and reflect on the contribution to knowledge. It evaluates how the research aims were met, and summarizes the main conclusions drawn from the research. It also includes the limitations of the work and potential future work related to the topic.

1.7. Impact of COVID-19 on Research

Prior to the UK lockdown I was completing the final stage of my fieldwork, working remotely in Bahrain, as my research involves cross-cultural design studies between Bahrain and the UK. During the period from January through July 2020 I was planning to finalise this fieldwork in Bahrain, then return to the UK to complete transcription and analysis of this final set of data, and complete final first drafts of Chapter 7 and then revise chapters 5 and 6 as final drafts.

I had to stop the final stages of my final study as the University I was doing my cross-cultural design study at in Bahrain closed down its campus (25/02/2020). I had to spend some time doing some final collection online instead doing remote interviews with participants during. It was difficult to complete drafts of three of the planned chapters in the intended timescale.

The above challenges with my progress have stemmed from multiple issues tied to the pandemic: (i) after the completion of my final data collection in Bahrain I planned to return to the UK to complete data analysis and finalise drafts of my thesis with in-person supervision. I then planned to return to the UK at the end of February; however, my travel was delayed several times due to flights being cancelled as a result of Covid-19 (05/03/2020). While I could have completed much of my final analysis and writing remotely, I needed to return to the UK still to gather important belongings and materials from my apartment related to my earlier PhD studies. (ii) I eventually returned mid March (11/03/2020) and self-isolated, just at the point the University announced the shut down of the campus and a week prior to the UK lockdown. At this stage, I also received a letter from the Bahrain government asking me to return to Bahrain as soon as possible(13/03/2020). Here I had to make a judgement call and pack all of my belongings in the flat as it was unlikely I would return to the UK again before the end of my studies. I returned to Bahrain in late March, just prior to the borders shutting down entirely, and self-isolated for 14 days there as well on arrival. (iii) The workshop series that were being conducted with students in Bahrain at the University were cut short due to the closure. The first parts of the workshop went as planned however, the close impacted the monitoring of the use of the activities in the design phase, as well as the feedback phase of the workshop. Therefore, there was further delay in trying to come up with an idea to still gather such information remotely. This meant writing new questions and conducting them through video conferencing. It also meant more time trying to reach the students and their contact numbers to arrange the video conferences. (iv) Personally, I faced further challenges which included setting up an environment at home that I can work in, difficulties motivating myself partly because of the ongoing isolation, as well as trying to manage the fear of contracting the virus and worrying about the people close to me.

Overall, this greatly impacted me, the alterations to my final study and data analysis means greater time is being spent on finalising that piece of work, in light of the more limited data collection I was able to conduct.

1.8. Contributions to Knowledge and Understanding

This doctoral research has explored a context that the existing literature does not sufficiently cover which is bringing different interrelated disciplines together, as well as building on the lack of empirical data available on the topic of localisation of global brands in different geographic contexts and settings. In doing so the research has resulted in insights and contributions to the topic of enquiry. A more detailed explanation of the contributions to knowledge and understanding can be found in Chapter 8. The contributions can be summarized as:

- This research serves to reveal the combine the different interrelated disciplines together which are globalization, localisation, brand management and spatial experience design. This is in relation to answering the first question of the research which is “Within the context of globalisation and localisation, what are the interrelations between brand management and experience design?”. Many interrelations were revealed in early stages in the literature review that were not previously connected and mapped out. These interrelations were later built upon with the methods used as part of this research. These interrelations included links between interior design and experience design, interior design and localisation, experience design and design management, global brands and the localisation of spatial experience design. The interlinks in literature are further explained in Chapter 2, while the interlinks found through the different research methods used can be found in the findings chapters including Chapters 4, 5, 6 and 7, then they are further elaborated on in the conclusion (Chapter 8).
- The research also confirms the value of authentic localisation through both the mapping the important of localisation through the different interrelated fields in the literature, as well as through the participants perspectives. This was to answer the first question of the research which is understanding the interrelations between brand management and experience design, but also in order to justify the need to create toolkits for experience

designers and brand management teams in the second question of the research. The value of localisation first came through in the literature review (Chapter 2), then in the interviews and Delphi survey (Chapters 4, 5 and 6). The value of localisation was then built upon with the creation of the toolkits that target authenticity when localising, a challenge that was apparent through the findings chapters. The toolkits development and testing is reported on in Chapter 7.

- Through this research the challenges that the teams face when localising their spatial experiences around the world was also evidenced. This helped lay the foundation and identify key ingredients that are needed to create the toolkits as part of the second aim relating to the second research question. The gap between the development of theoretical work around the subject and the implementation of the theories in practice was apparent through the literature review. Therefore, the method set out to investigate the challenges that the teams working within global brands and translating the spatial experience into different geographic contexts and settings face. These challenges included budget, time, and team distribution related (the challenges faced are reported on in the findings – Chapter 4, 5, and 6). The toolkits developed therefore bridge the gap between theory and practice that has been a pattern that has been noticed through literature where researchers in experience design and management have noticed and have urged to be brought closer together (The toolkits are reported on in Chapter 7). The findings are classified in a way that can assist other brands and experience design teams in overcoming shared challenges when it comes to localising their spatial experiences (reported on in the conclusion – Chapter 8).
- Finally demonstrating potential toolkits that can be used to address all of the points found through the research such as the combination of disciplines, encouraging authentic localisation and keeping in mind the challenges and the key ingredients needed when localising spatial experiences was another major contribution of the research. This was done through a developing a prototype of the toolkits, and testing it in the context of Bahrain by allowing the students in Ahlia University to use it as a part of a module (Reported on in Chapter 7).

Chapter 2: Literature Review

2.1. Introduction

This chapter reviews the literature and existing knowledge regarding spatial experience design, and its relationship to localisation and brand management. The chapter concludes by identifying the gap in the literature that directed the primary research enquiry that is addressed in the content of the thesis. This chapter presents a review of the literature and existing knowledge related to the research aims. It serves three interlinked purposes: to explain the context and background of the investigation and locate the research within the field; to identify a gap in the knowledge that this thesis will address; and to identify aspects that may affect design teams' addressing of the localisation of spatial experiences within global brands.

Given the multidisciplinary nature of the field of the localisation of spatial experience design for global brands, relevant knowledge is distributed across diverse and disparate areas, prompting the need for a broad review of interior design, experience design, localisation, branding and management literature, which bring together the understanding available for the aim of this thesis.

The first part of the chapter starts by presenting the endeavour to make the best use of space, along with the attention to user well-being and functional design and how it continues to push the development of the interior design profession. Starting with the start of the profession of interior design and how it came to be, the chapter will explain its role in creating spaces that are attuned to the cultures, geographies and contexts within which they exist. Then the importance of localisation in global brand spaces is explained. The next section aims to report on the concept of experience design and how it further influenced interior design and prompted the field to incorporate an experiential view of spaces instead incorporating a more multidisciplinary and holistic view of spaces. The final section looks into brand and design management literature to understand how the complexity of localising spatial experience is dealt with from a management point of view, and how it can be furthered.

2.2 Interlinks between the Different Fields

As one of the research questions is "*Within the context of globalisation and localisation, what are the interrelations between brand management and experience design?*" the literature review will draw on the links found in literature by bringing the different related fields together. Many

interrelations were revealed in early stages in the literature review that were not previously connected and mapped out in other literature. The interlinks are displayed below in the diagrams and further elaborated on in this chapter.

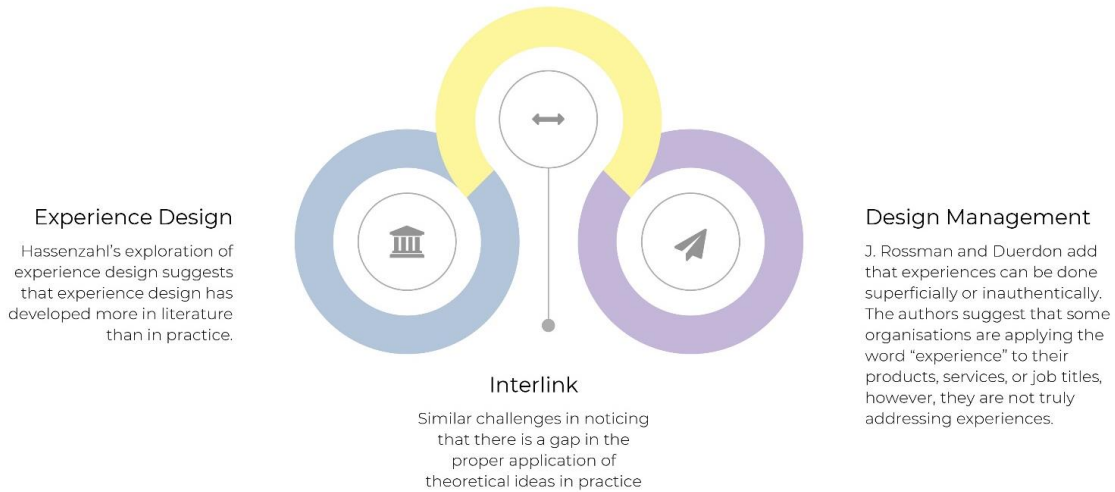


Figure 1: Interlink between the field of experience design and design management. Source: Author.

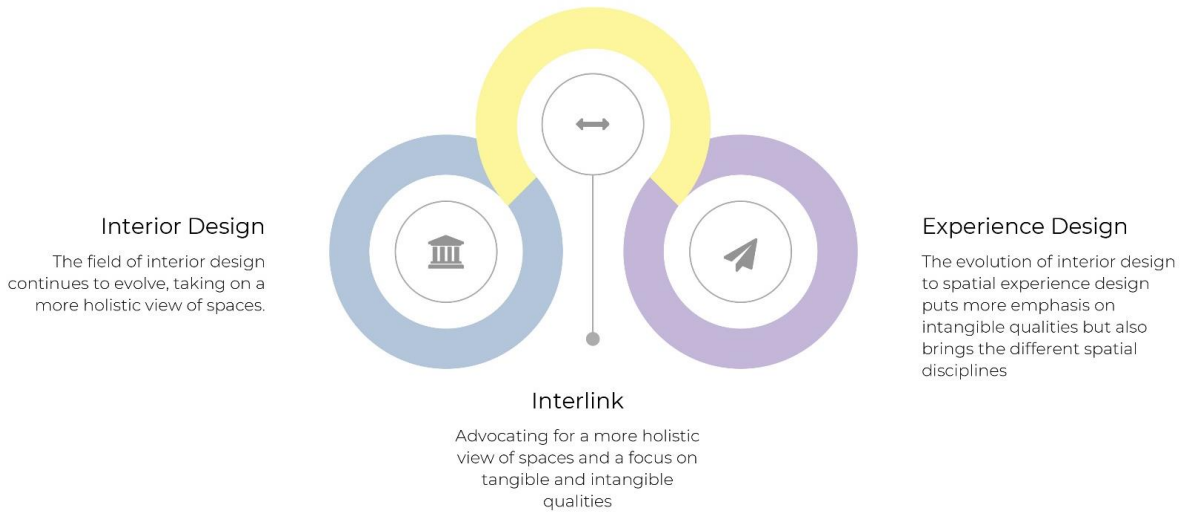


Figure 2: Interlink between the field of interior design and experience design. Source: Author.

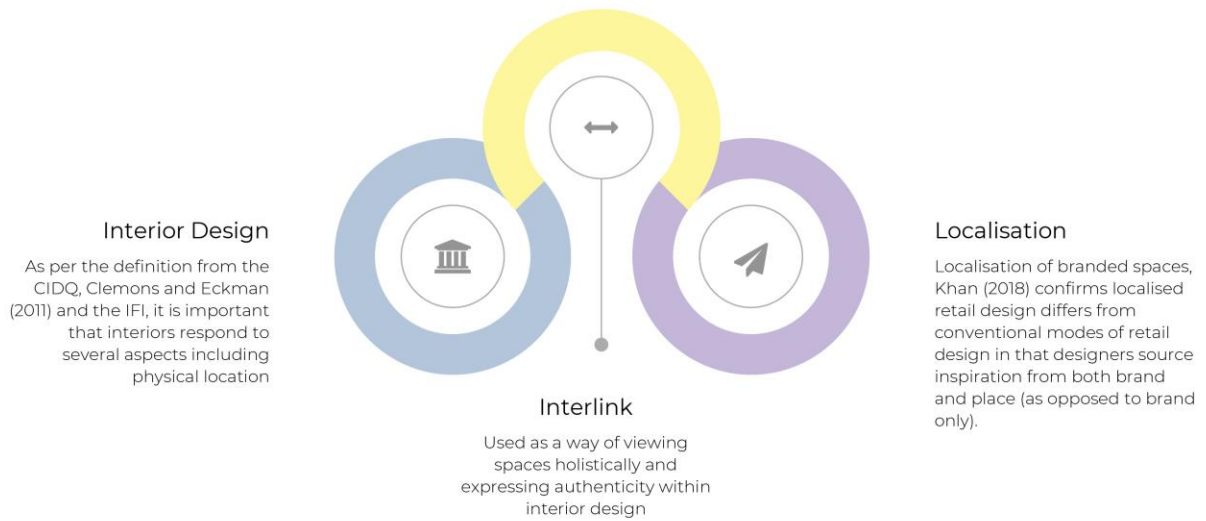


Figure 3: Interlink between the field of interior design and localisation. Source: Author.

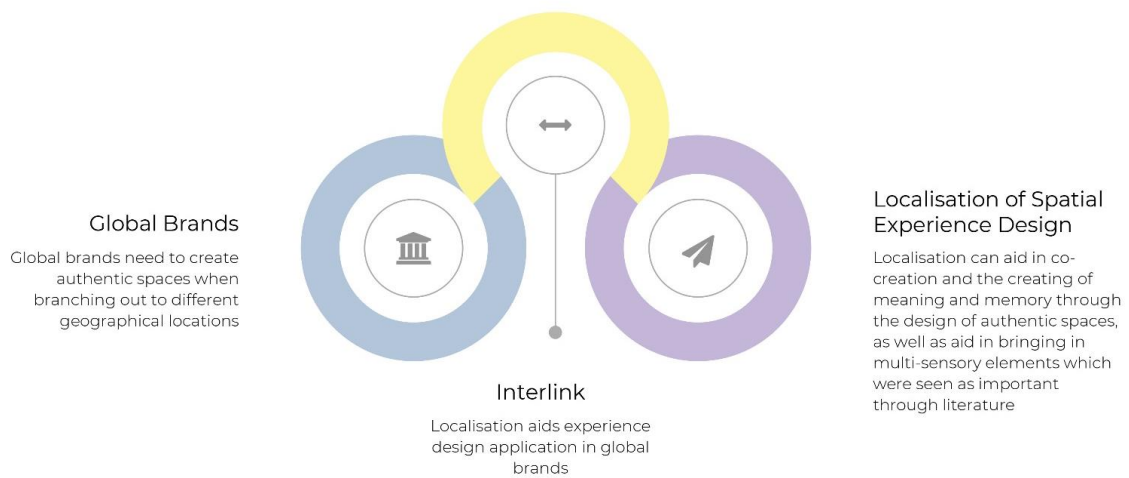


Figure 4: Interlink between the field of global brands and localisation of spatial experience design. Source: Author.

2.3. The Origins and Early Role of Interior Design

Human beings spend most of their lives making use of the interiors of physical settings such as homes, classrooms, workplaces, and commerce. Making use of interiors started a long time ago however. Pile and Gura (2014) observed that there are many accounts about how the practice of interior design started and where and when people first learned to use shelters and what the earliest habitations were like. They suggest that the early shelters existed to provide interior

spaces that offered comfort to their inhabitant. Humans were constructing temporary wooden huts as early as 380,000 BCE. Other types of houses existed; these were more frequently campsites in caves or in the open air. The oldest examples are shelters within caves, followed by houses of wood, straw, and rock (Pile & Gura, 2014). This shows that interiors have been created for millennia, but not with the same complexity and requirements that exist today.

Even though interiors have been around for millennia, Piotrowski (2013), an author of several books on the subject of interior design, notes in her book *“Professional Practice for Interior Designers”* that the use of the term interior design did not appear in general usage until after World War II, and the profession did not really exist much before the 1900s. Piotrowski (2013) adds that during the late 19th and early 20th centuries, interior design was primarily practiced by artisans, craftsmen, painters and sculptors, and early architects. In the early 1900’s, the term “Interior Decorator” was used and most decorators at the time had no academic credentials, but addressed issues, such as scale, proportions, and aesthetics within spaces.

As interior design continued to be practiced by many outside the profession, an on-going discussion was prompted about the differences between interior decoration, design and architecture. The debate is on-going at the time of writing, and Dodworth (2015) states that it is partly because the distinctions between these aspects of interior design are not absolute. The interlinks between these concepts shows that there is an attempt to consider a holistic view of spaces, however, the definitions and boundaries that have been on the different fields may have restricted a more holistic view. In the book titled *“The Fundamentals of Interior Design”* Dodworth (2015) tried to define the boundaries of interior design, interior decoration, architecture and interior architecture. Dodworth (2015) argues that interior decorators generally work with existing spaces that do not require physical alteration; they will transform the look of a space but with very little or no change to the structure of the building. Interior design will vary from the purely decorative, to designs requiring a great deal of structural change, while an architect is someone who uses planes (walls, floor, ceilings) to define volumes (spaces) that combine to make a building (Dodworth, 2015). Architects are trained to design structures from scratch. The interior architect however is generally concerned with taking existing structures and reforming them to suit new functions. They will pay a great deal of regard to the previous life of

a building, and usually allow this knowledge to provide some connection between the fabric of the building and the newly created interior. All of these definitions show that the field of decoration, design and architecture look at spaces, and they all consider important aspects that make up the space, however, the definitions restrict each field to certain aspect of the space.

According to Dodworth's definitions of the fields of interior decoration, design and architecture, what was practiced for centuries in early shelters and what was primarily practiced by artisans, craftsmen, painters and sculptors, and early architects was interior decoration, which is only a part of what the interior design profession includes today. Moreover, the fields of interior decoration, design and architecture are so interlinked that they sometimes overlap. Therefore, interior design transcends a single field and literature and advancements in other fields could also be relevant to interior design. Interior decoration has evolved a lot from early shelters to the profession it is today. Today, a commonly-used definition of interior design, supported by interior design professional associations, comes from the CIDQ (Council for Interior Design Qualification):

"Interior design is a multifaceted profession in which creative and technical solutions are applied within a structure to achieve a built interior environment. The solutions are functional, enhance the quality of life and culture of the occupants, and are aesthetically attractive. Designs are created in response to and coordinated with the building shell, and acknowledge the physical location and social context of the project. Designers must adhere to code and regulatory requirements, and encourage the principle of environmental sustainability. This including research, analysis and integration of knowledge into the creative process, whereby the need and resources of the client are satisfied to produce an interior space that fulfils the project goals."

(CIDQ, 2020)

This definition highlights interior design as a multifaceted profession and the important role of interior design in creating spaces that are attuned to the cultures, geographies and contexts within which they exist, and to consider interior design as a practice that navigates a range of complex factors that go beyond aesthetic decoration. This is echoed in other definitions of interior design – for example, the international federation of interior architects/designers (IFI) (www.ifiworld.org) states that interiors should support life (humanity) and all its functions

through design. Stephanie Clemon, considered an expert on interiors by Interior Design Educators Council and the American Society of Interior Designers (UDTS, 2021), states in a paper co-authored with Eckman (Clemons and Eckman, 2011), that “The design of interior spaces revolves around human beings, human life, and human activities”. Therefore, as human beings, their lives and activities evolve, the profession evolves as well to embrace those changes.

Therefore, most current definitions used for interior design today confirm the importance of looking into aspects within space that are beyond decoration, including attuning them to the human being occupying these spaces, which differs depending on the cultural context. The more recent definitions of interior design consider a more holistic view of spaces compared to the historical practices, but the separation of the fields interior decoration, design and architecture and the need to define them individually may stand in the way of a more holistic consideration of spaces.

2.4. Localisation of Design

As per the definition from the CIDQ, Clemons and Eckman (2011) and the IFI, it is important that interiors respond to several aspects including physical location and social context in order for the design to support the all the functions of humanity, as belonging to a certain context is one of the functions. In this thesis, the term localisation refers to the attuning of interiors and products to cultures, geographies and contexts. Localisation of design has been discussed a lot in the literature within the context of globalisation. Globalisation is the inevitable integration of markets, capital, nation states and technologies in ways that allow individuals, groups, corporations, and countries to reach around the world farther, more deeply, and more cheaply than ever before (Sachs, 2010). One of the major divides in the studies of globalisation today is whether increased international trade as a result of globalisation is imposing cultural homogenization or, in fact, working to enrich and preserve culture though expanded access to the Internet and increased cross-cultural contact (Ozosmer, 2012).

Cultural transfer is not a new phenomenon. For thousands of years it has been part of global cultural development linking the continents in an increasingly complex web of production and trade. Globalisation only stimulated expansion and as a result we have witnessed an increasing spread and intensification of cultural transfer. New approaches see cultural transfer as a complex interaction between the global and local that lead to hybrid identities in which content from different cultural contexts are put together to constantly form new cultural patterns (Brandle, 2010).

The authors Ajmar-Wollheim and Mola (2011) in the book *“Global Design History”* suggests many examples of cross-cultural design examples from as early as the 1500s. Ajmar-Wollheim and Mola (2011) suggest many examples of hybrid design, for example the European Renaissance had complex processes of exchange, cross-fertilization and hybridization with other civilizations across the world. Therefore, it was the beginning of a progressively globally-integrated culture. Other examples in the same book include Gerritsen’s article about 16th century Chinese potters producing ceramics in designs that could appeal to consumers in many different cultural contexts. Therefore, even though hybrid design is not a new trend, it has intensified, along with the struggle to balance between global and local aspects.

Along with this globalisation, we have seen the emergence of global brands (Dimofte et al. 2010; Özsomer 2012). A global brand is characterised by being widely-available across international markets and enjoys high levels of recognition across the world (Dimofte et al., 2008, 2010). Successful global brands need to create a balance between sending a coherent message, while still tailoring it to different geographical settings and contexts (Hands, 2008; Holt et al, 2004; Eldemener, 2009; Boutros, 2009), thus necessitating cross-cultural design.

According to Davis (2017) in the book *“The Fundamentals of Branding”* a brand is the interface between a company and its audience. A brand may come into contact with its audience in various ways; from what we see and hear, through to the physical experience with the brand and general feelings or perceptions we have about a company. Therefore, a brand encapsulates both the tangible and the intangible. Furthermore, there is a parallel history in the development of “brand” design, just as there is with interior design, as brand design itself becomes more than

decorative much like interior design, beyond mere simplistic ideas of visual design. A brand needs to consider not only intangible aspects, but also cross-cultural strategies, much like design.

From a branding point of view Davis (2017) explained how a brand can be developed successfully. Davis stated that developing a brand requires a deep understanding of how that business, organisation or person operates. Once this is established, a brand strategy can be formulated, which acts as a blueprint for the business and further defines other areas. Since a brand is for an audience, a deep understanding includes an understanding of the globalised market and today's consumer. In today's globalised markets, consumers are awash in a mix of foreign and local goods, images, lifestyles, and consumption ideologies (Zhao & Belk, 2008). From a marketing perspective Liu et al. (2017) suggest that one of the most critical challenges in global marketing today is to understand the factors driving the effects of global versus local cultural positioning among conflicting forces of globalisation versus the resurgence of local ideologies (Liu et al., 2017). So when a brand deals with the challenges of balancing between global and local, a brand can formulate a strategy including what happens in terms of design when it comes localisation that acts as their blueprint (Davis 2017).

Branding literature further confirms that brand strategy faces two opposing forces, and highlights the advantages and disadvantages of keeping some aspects of the brand global or local. On the one hand, the use of uniform brands across markets offers advantages in terms of costs as well as ease of planning and implementation (Jain 1989; Dikova and Brouthers 2016). Furthermore, uniform brands can leverage off greater customer familiarity across national boundaries in an increasingly global marketplace (Barron and Hollingshead 2004; De Meulenaer et al. 2015). On the other hand, attuning to geographic contexts offers advantages in terms of their overall appropriateness and appeal with respect to aesthetics, positioning, meaning, and, hence, customer acceptance (Van Gelder 2005; Haley and Boje 2014).

A controversial question is the extent to which global brand practices resemble those of the parent company (standardisation) versus the extent to which they act and behave as local firms (localisation) Edwards, Sanchez-Mangas, Jalette, Lavelle, & Minbaeva, 2016; Cheon, Cho, & Sutherland, 2007; Pudelko & Harzing, 2007). Standardisation is generally understood as the implementation of strategies in line with management practices employed by headquarters,

reflecting the country-of-origin effect (Pudelko & Harzing, 2007). Localisation, on the other hand, considers the inherent diversity of each international market framed by the cultural context in which the brands are embedded (Singh, 2011). The term “glocalisation”, a portmanteau of globalisation and localisation, was advanced by Robertson (1995) as a refinement of globalisation, referring to “the simultaneity the “co-presence” of both universalising and particularising tendencies” (Robertson, 1997). The term “glocal” is defined in the Oxford Dictionary as “reflecting or characterised by both local and global considerations,” and “glocality” is defined as experiencing the global locally or through local lenses (Roudometof, 2016). Most global brands have a glocal strategy that aims to create an appropriate balance by implementing a universal strategy in a locally-sensitive manner with an understanding of local contexts and societal needs (Jain & De Moya, 2013). However, the balance of global versus local is still in debate during the writing of this thesis.

The inherent balancing of glocal is also seen in design literature. In relation to global and local in terms of design, several essays in Volume 25, No. 3 in the Journal Design Issues (Fiss, 2009) examined contemporary developments in fashion, architecture, and industrial and graphic design in light of the evolving pressures of globalisation. The authors analyse the myriad ways design cultures negotiate between the local and the global in many contexts such as Africa, Greece, Barcelona, Shanghai, and British-era Hong Kong. They also discuss the varying form of cultural hybridity that emerged out of globalisation, suggesting that local design culture are both challenged and enabled by the increasing globalisation of the marketplace.

Furthermore, in terms of the struggle of global and local in design, it is also evident in the book *“Arabesque: graphic design from the Arabic world and Persia”* by the authors Wittner and Thoma (2011) who come from a product and communication design perspective. They talk about the struggle of global versus local in the Middle Eastern context; “More designers are constantly struggling to define their identity within this murky water of hybrid “global” design, balancing themselves between their status as an individual and their connection to the latest trends”. This shows that localisation was previously important in early shelters but as globalisation made designers look at designers outside their cultural zone, the local blended with the global exists,

thus encouraging cross-cultural design. Wittner and Thoma (2011) added that designers who design hybrid designs in the Middle East for example are “embracing Westerns ideologies, appropriating them and subverting them to their own ends and needs. They are defining their cultural identities by marrying East and West, Old and New, in search of the most honest and inspiring representation of their true and social and professional realities”.

In the field of architecture, in the book *“A Global History of Architecture”* (Ching et al. 2011) the authors also argue for the linking of local and global. They suggest that designing with local in mind does not mean to “replicate ancient techniques or falsely aestheticize local customers, as is so often done by those. Which suggests there are meaningful ways of implementing hybrid designs rather than just replicating or reducing the elements. Understanding the way in which it can be done meaningfully would also benefit businesses in creating their blueprints.

As regards the localisation of branded spaces, Khan (2018) confirms that to express authenticity, global brands may opt for localised retail store design (retail stores that express the place in which the store is designed) as a form of unique retail design that offers an experience that is rooted in a time and place. Localised retail design differs from conventional modes of retail design in that designers source inspiration from both brand and place (as opposed to brand only). Khan (2018) further quotes Van Veen: “...localisation is about mattering more to people. Globalisation, digitisation, and urbanisation are dehumanising cultural contexts to which brands must respond.”

Related to the concept of re-humanising cultural contexts (Khan 2018), is the movement of decolonising design. Danah Abdulla’s work focuses on decolonising design, possibilities of design education, design culture(s) with a focus on the Arab region, the politics of design, publishing, and social design. She mentions that “Decolonization” is a word we’re increasingly hearing at design events, often being used interchangeably with “diversity.” Abdulla and her group’s co-founders have written extensively on the colonial systems within which contemporary design operates.

Anoushka Khandwala (2019) explains decolonisation of design by stating that to understand the place of decolonisation within design, it’s vital to first get our terms straight. She explains that

“Colonisation” is rooted in indigenous peoples’ experiences of oppression—specifically, the seizure of native resources, as well as the embedding of Western ideology into society. She adds that the word “decolonisation” was originally used to describe the withdrawal of a state from a former colony. Now, decolonisation has come to represent a whole host of ideas: It’s an acknowledgement that in the West, society has been built upon the colonisation of other nations, that we exist within a system of privilege and oppression, and that a lot of the culture that is seen to be local to specific geographical contexts or settings has actually been appropriated or stolen.

Select many of the global brands from the global brand leader boards and their background is usually Western. Big brands such as Coca-Cola, McDonalds, Starbucks, IKEA, Adidas, Nike, and many more have western origins. Since the brand has to revert back to the country of origin for the brand blueprint or strategy as previous literature suggested global brands are against this movement. Therefore, localising would help them better adapt to geographical contexts and settings by taking inspiration from both the parent company as well as the geographical setting or context.

Abdulla et al. (2019) suggest that to date, mainstream design discourse has been dominated by a focus on Anglocentric/Eurocentric ways of seeing, knowing, and acting in the world, with little attention being paid to alternative and marginalised discourses from the non-Anglo-European sphere, or the nature and consequences of design-as-politics today. They add that the work designers make is inspired by taste, and taste is often derived from what we’re exposed to during our upbringings. They also add that design values and history is taught through a canon; that accepted pantheon of work by predominantly European and American male designers that sets the basis for what is deemed “good” or “bad.”

This shows that design has to be attuned to cultures, geographies and context from the start, even a force like globalization did not eliminate that need. Understanding how to create a balance between global and local meaningfully would benefit global brands in creating their blueprint or strategies. Therefore, the localisation of design remains important today, adding another layer of complexity within global brands in the balancing of glocalisation.

2.5. From interior design to spatial experience design

Petermans and Van Cleempoel advocate for the use of experience in spaces that are designed for global brands as a means to engage consumers. They argue that 'authenticity and originality' are possible ways to create memorable experiences for consumers in retail design. Experience in retail design is a means of value creation for both the consumer, and the brand, and can act as a tool for differentiation, creating positive impressions of the global brand's unique character among competitors. Differentiation is also viewed as a way to avoid standardisation and homogenisation, symptomatic of globalisation, which consequently aids localisation.

The interior design profession has faced another major shift that can be seen in more recent literature. As alongside these more holistic understandings of interior design practice that moved it away from merely decorative, the discipline has more recently incorporated an experiential point of view building on the intangible qualities that were discussed in previous sections. This evolution of interior design to spatial experience design puts more emphasis on intangible qualities but also brings the different spatial disciplines (interior decoration, design and architecture) together, as well as other design disciplines, to create a unified discipline. This discipline put more emphasis also on attuning the spatial experience design to different geographical contexts and settings, as localisation can help global brands achieve authenticity and originality, which is one of experience design's goals (Petermans and Van Cleempoel, 2009). Therefore, the concept of localisation and experience design are interlinked, and thus exploring the boundaries of experience design and its origins will help understand how to achieve memorable spatial experiences for global brands using localisation.

Beyond interior design, the emergence of the focus on experience was acknowledged by Pine and Gilmore (1999), which they called "the experience economy". They observed that at the turn of the 21st century, the nature and progression of economic value was shifting from a focus on material goods, to a focus on services, and a subsequent further shift to customer experiences. The idea of experiences can be traced back to 1998, when B. Joseph Pine II and James H. Gilmore introduced a new way of thinking about commodities as not just being about goods and services. The pair argued that commodities were more about human experiences that are highly

memorable and emotionally-engaging enough to sustain long-term value and relationships. Such experiences were powerful enough to change the ways people lived and behaved. In short, Pine and Gilmore believed people were willing to pay more for the commodity with the experience factor. To explain when experiences occur Pine and Gilmore declare: “Companies stage an experience whenever they engage customer, connecting with them in a personal, memorable way.” (Pine and Gilmore, 1999)

Furthering this path, experiential theorists in the 1980s (e.g., Hirschman and Holbrook 1982; Holbrook and Hirschman 1982; Thompson, Locander, and Pollio 1989) encouraged a broader view of human behaviour, recognising the importance of the emotional aspects of decision-making and experience. As the IFI definition of interior design stated that interior design supports the functions of humanity, a different view on human behaviour affected the view of interior design.

Design research addresses the same shifts now in addressing experiences, moving from making material artifacts, to experience and other less “material” forms of making. The shifting foundations of the design disciplines as a result of the impact of the business and marketplace are explained by Sanders and Stappers (2013) in their chart (Figure 5). They state that until recently, design was primarily concerned with making “stuff”, however design is moving away from making stuff for people.

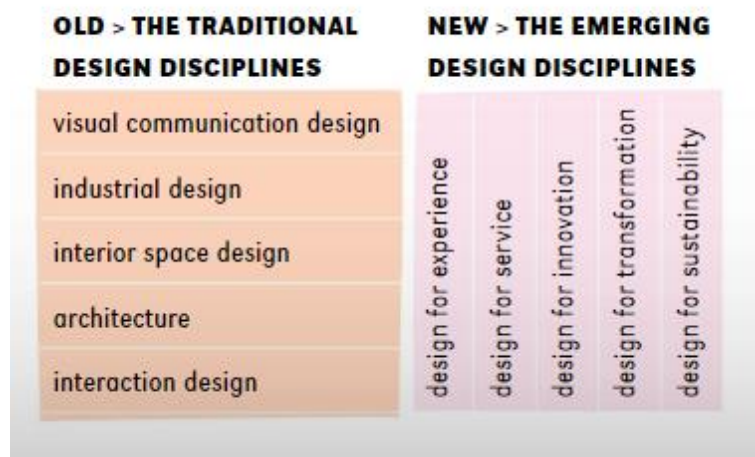


Figure 5: Sanders and Stappers' (2013) chart on Design Disciplines. Source: Sanders and Stappers, 2013.

As Sanders and Stapper (2013) note, the emerging design disciplines is design for experience or service rather than design for interiors only. This means a more holistic view of spaces. It also means that more than just interior design is combined within a space to make a successful experience. Design fields have to come together to form a holistic view of the space, this affected how design is done as interior design became multi-disciplinary. Which means that for global brands that want to be attuned to human beings' activities, a blend of branding, interior design, architecture, localisation and an incorporation of the tangible and intangible all have to be present within one physical space. Therein lies the need for what I call "localised spatial experience design" in this thesis, which refers to experience design within the physical space of global brands that has been attuned to different geographical contexts and settings.

In their paper at the "10th International Conference on Design & Emotion", Cales et al. (2016) argue that rather than interior design, the branded spaces that employ experiential qualities is retail design. Retail design is a young evolving discipline (Christiaans & Almendra, 2012; Petermans & Van Cleempoel, 2010), often considered a sub-discipline of interior design (Quartier, 2015; Skjulstad, 2014). The latter is rather logical, since the design of commercial spaces has traditionally belonged to the scope of interior designers (and architects) (Christiaans

& Almendra, 2012). Driven by the emancipation of interior design in the 1980s (Quartier, 2015), retail design has evolved from a rather artistic and interior-led discipline to a mature strategic, multi-disciplinary and customer-centric practice. Nowadays, the focus is on the functional aspects and commerciality, brand communication and the creation of experiences (Christiaans & Almendra, 2012; Dalziel, 2014; Quartier, 2015; van Tongeren, 2013). Hence, Quartier (2015), Skjulstad (2014) and Christiaans & Almendra (2012), therefore branded spaces applies the concept of experiential design.

Arguing that retail design goes beyond the aesthetic and functional design of a space, Cales et al. (2016) point out that it embraces multiple disciplines such as interior design, architecture, product design, graphic design and needs to be further substantiated with knowledge from social sciences (e.g. psychology and sociology), service design, communication, branding theory and marketing. Thereupon, Quartier (2015) defines retail design as the design of spaces for selling products/or services and/or brands to consumers. Furthermore, it is interdisciplinary in order to create a sensory interpretation of brand values, through physical or virtual stores.

In line with the experience economy, in retail design the term “user experience” was devised. The “user experience” is consolidated and widely diffused by the acronym “UX” (user experience), and especially in the business world (as there is a parallel history between brands and design) According to Capra et al. (2019) the term “user experience” can be defined as the perception and response of people as to the use (or anticipation of use) of a product, system or service. Therefore, it refers to the description of the totality of an individual’s experience with the products and business with which they interact. UX research has been used as an approach to understand how to give the customers better experiences with their products in order to develop better products.

Many retailers are incorporating the “customer experience” as a component of their customer offerings. The term customer experience is the same notion as user experience but since it is a retail environment, the user is referred to as the customer. Within the customer experience there is the customer journey. Within the customer journey, existing studies suggest that different customer touchpoints can be identified (e.g., Baxendale et al. 2015; De Haan, Wiesel, and Pauwels

2016). The customer journey is a customer's "journey" with a firm over time during the purchase cycle across multiple touchpoints. The multiplicity of channels is another factor that affected the spatial experiences of today's retail, as many consumers use multi-retail channels when shopping and as a result of the new channels such as the use of smartphones to shop, their way to approach the physical stores has changed, which in turn has affected the design of these spaces (Backstorm & Johnsson, 2017). Faced with increased competition from web retailing, merchants are elevating the spatial experience into something more meaningful by differentiating it with the experience design factor. From a design management perspective, Sachdeva and Goel (2015) believe that creating an experience for the consumer in the physical store is more important than ever in order to differentiate this channel from other ways that a consumer can approach retail. Research on multichannel retailing shows that such changes have major impacts on consumers' shopping activities as well as how retailers organise their offerings (e.g. Godfrey, Seiders, and Voss 2011; Jones and Runyan 2013; Kollmann, Kuckertz, and Kayser 2012; Venkatesan, Kumar, and Ravishanker 2007).

Other research in retail spaces also address the rising influence of online retailers and how they are constantly transforming traditional physical stores into multi-channel retailers (Min & Wolfenbarger, 2005; Pentina, Pelton & Hasty, 2009; Zhang Farris, Irvin, Kushwaha, Steenburgh & Weitz, 2010). This multi-channel approach creates a seamless experience for the customer across the different points of interaction with the brand (Hall & Towers, 2017; Levy, Weitz & Grewal, 2013, Tuefel and Zimmerman, 2015). Those different points interaction with the brand are called touchpoints and they require fundamental changes in the organisational and strategic mindset of the brand (von Briel, 2018). At any point of interaction with the company as a consumer, the consumer gets a message that represents that brand.

Von Briel (2008) confirms that physical stores are going to remain important by arguing that the spatial experience will continue to represent a fundamental touchpoint in the customer journey. The primary challenge is developing a "holistic innovation that can transform major processes across the store to better suit needs of customers today" (Deloitte 2018). By that Deloitte means that all of the touchpoints and the journey work together. The customer for example does not need to purchase in the store, they might visit to view the item in the physical store however

they might purchase it online. New ways of organising the physical store are proposed and evaluated; such as 'showrooms' (Bell, Gallino, and Moreno 2014) or 'click-and-collect' concepts (Chatterjee 2010). The implementation of such novel store concepts will likely have a significant impact on consumers' in-store experiences. Another example of holistic innovation is the implementation of various technological solutions having lately been referred to as an important competitive retailer advantage, both in handling competition from other channels and in creating positive customer experiences (e.g. Blázquez 2014; Dennis et al. 2012; Poncin and Mimoun 2014).

For the reason that experience design is holistic and multidisciplinary, references to experience can now be found in various design fields. For example, inspired by Pine and Gilmore's advice, Shedroff's (2001) book titled *"Experience Design"*, focuses on the design of digital interfaces that are driven by user experiences rather than functional usability. Klingmann's *"Brandscapes: Architecture in the Experience Economy"* (2007) is also inspired by Pine and Gilmore's advice and focuses on architecture. While the book titled *"Experience Design: Concept and Case Studies"* (2015) offers a compilation of more recent research done in experience design in various design fields by various authors including the fields of objects, environments, interactions and performance design.

From the design perspective, the book *"Experience Design: Concept and Case Studies"* brings together scholars from different design fields to provide their thoughts on the emerging field. This shows that experience design transcends singular fields and is a holistic view that ties many design fields together. The book groups the literature into themes including: positions, objects and environments, and interactions and performances, in which the theme objects and environments is the closest in dealing with the aspect that affects interior design.

Under the theme "objects and environments", Rajendran et al. (2015) explore experience design in relation to spaces. Within their study they explore the impact of urban spatial experiences on the need to reflect one's self though identification with the physical environment. They also refer to experience design that is related to spaces as "spatial experience".

The above literature shows the popularity of the concept that was proposed by Pine and Gilmore. The outlook of experiences affected interior design resulting in places being seen as not only

existing physically but also in people minds and memories. The identity of specific spaces becomes interesting when bringing a certain experience, evoking associated memories. Moreover the consideration of the totality of an individual's experience with the products of the business with which they interact meant that businesses need to consider not just interior design but all elements that visitor will come into contact with within the space. Therefore, creating a more holistic view of spaces.

Tufuel and Zimmerman (2015) refer to the same idea of experiences as "Holistic Design". In their book that focuses on retail design specifically, they speak about how physical stores have a hard time competing with internet prices, and can therefore compete in terms of experiences. They also explain that as a result of the focus on experiences, the roll out of standardised concepts that retail spaces focused on for decades, are fading, and the emphasis is gradually shifting towards delivering experiences that allow for local iterations.

Furthermore in terms of physical spaces, Healy (2008) suggested that the best experiences within environments are those where designers find ways to give customers the thrill of discovery, to come across as authentic, and to echo the brand's insights and ideas, while maintaining a visual and sensory link to the brand identity. This can be accomplished, as he suggests, through devices such as large wall decorations and custom built furnishings, as well as through subtler means such as lighting, and even spatial scents. This means that experience design also takes into consideration a holistic view of the spaces rather than interior design, even more so than the shift from interior decoration to interior design.

In the context of experiential design in retail physical environments, scholars have described various in-store aspects that conceptualise consumers' experiences (e.g. Grewal, Levy, and Kumar 2009; Puccinelli et al. 2009; Verhoef et al. 2009) and examined the effect of such aspects on in-store behaviours and experiences (e.g. Andreu et al. 2006; Babin, Hardesty, and Suter 2003; Baker et al. 2002; Eroglu, Machleit, and Chebat 2005; Mattila and Wirtz 2001).

There is research exploring the consumer perspective and how they find these experiences. It is clear that retail has become a multi-channel shopping experience where the physical store is only one of the touchpoints. However, the physical store remains an important touchpoint even if

consumer patterns in the way they interact with the spatial experience changes. Therefore, interior design remains important today, however considering a more holistic view of spaces, adding another layer of complexity that global brands have to deal with when localising their experiences to different geographic contexts and settings.

2.5.1. Defining the Boundaries of Experience Design

Some literature defines experience design as where business meets design (Solis, 2015), that is why extensive experience literature can be found in the fields of business, marketing, management and design. It is clear through the literature from the different fields that creating positive experiences is the new competitive advantage for brands. Some scholars attempt to articulate what creating a positive experience means. Therefore, these sections outline the literature on practically creating positive experiences, furthering the concept of Pine and Gilmore. In this section, dispersed literature from the related fields are brought together in order to understand what is already available in terms of practical steps that can be taken to understand how to design positive experiences. The section also contains further links of experience design to localisation and how it can be used in experience design in order to achieve the desired positive experiences when designing spaces.

Since the literature related to experience design is so dispersed, bringing this literature together will help facilitate the development of clear experience definitions and propositions about experience characteristics, which will help facilitate increased interdisciplinary experience-design-related understanding.

The section starts out by outlining that literature suggests that experiences are subjective, therefore the entire experience cannot be designed, as there are aspects beyond the designer's control. However, there are areas within experiences that can be designed for. The different areas that designers and managers have control over and can influence experience design and localisation come from literature, they include co-creation, multi-sensory, memory, storytelling, customer research and human-centred design. Each will be discussed below.

2.5.2. Experience Design Boundaries and the Importance of the Physical Context

One of the purposes of design, in the experience dimension, is to create the conditions that allow the experience to be created in a planned way (Capra et al, 2019). This section explores the literature that suggests that experiences are subjective in nature, and therefore contain parts that cannot be designed for and are out of the designer's and the manager's control. Starting with this concept allows us to look at literature in later sections that discuss the boundaries of experience knowing that the framework will help create a positive experience by narrowing down what designers and managers should focus on in a complex multi-disciplinary field, therefore bringing it together to facilitate clear boundaries.

Schmitt, Brakus, and Zarantonello (2015) suggest that every service exchange leads to a customer experience, regardless of its nature and form. This expansive perspective considers customer experience as holistic in nature, incorporating the customer's cognitive, emotional, sensory, social, and spiritual responses to all interactions with a firm (e.g., Bolton et al. 2014; Gentile, Spiller, and Noci 2007; Lemke, Clark, and Wilson 2011; Verhoef et al. 2009). They suggest that while companies may succeed in designing experiences by chance because every interaction is an experience according to Schmitt, Brakus, and Zarantonello (2015). Other literature suggests that experiences can also be created intentionally and realised through design.

Moreover, in their study on brand experience, Brakus, Schmitt, and Zarantonello (2009, p. 53) conceptualise brand experience as subjective, internal consumer responses (sensations, feelings, and cognitions) and behavioural responses evoked by brand-related stimuli that are part of a brand's design.

Moreover, Marc Hassenzahl who has done extensive research in the field on experience design also confirms Schmitt, Brakus, and Zarantonello's (2015) points on experiences being subjective. Marc Hassenzahl is a professor of "User Experience and Ergonomics" at the Folkwang University in Essen, Germany, and research manager at MediaCity, Åbo Akademi University, Vaasa, Finland. Hassenzahl (2021) states that as opposed to a task-oriented approach (which he uses to explain traditional design disciplines), the experience-oriented approach focuses on the personal, subjective side, while understanding interaction as a dynamic story, able to create emotions and meaning.

Therefore, one of the most important roles of designers in this situation is to infuse more emotional value into experiences, as emotional value can help people be happier and more creative when interacting with experiences (Norman, 2005). This supports aesthetic user experience beyond goal-oriented qualities such as effectiveness and efficiency.

Hassenzahl (2021) adds that we understand an experience as “an episode, a chunk of time that one went through—with sights and sounds, feelings and thoughts, motives and actions [...] closely knitted together, stored in memory, labelled, relived, and communicated to others. An experience is a story, emerging from the dialogue of a person with her or his world through action” (Hassenzahl, 2010, p. 8). After living an episode, people engage in meaning-making, they literally tell stories to themselves (and others; Baumeister & Newman, 1994). These stories contain the When, Where, and What, detailing a temporal-spatial structure and the content of the experience. In addition, people can tell whether their experience had been positive or negative (i.e., affectivity). Affectivity is a crucial ingredient of experience (Desmet & Hekkert, 2007; Forlizzi & Battarbee, 2004; Hassenzahl, 2010; McCarthy & Wright, 2004)—any experience has an “emotional thread” (McCarthy & Wright, 2004), and it is this affectivity that relates experiences of happiness. This further explains Hassenzahl’s focus on emotions in the experience-oriented approach in that design includes multisensory elements, memory, motives, threaded in a story, within a context, creating emotions. Hassenzahl mentions the “where” in the context that affects the experience, which is the focus of this thesis.

Many other scholars also suggest that experiences are inherently emotional and personal; many factors are beyond the control of management such as personal interpretation of a situation based on cultural background, prior experience, mood, sensation seeking personality traits, and many other factors (Belk, 1975; Gardner, 1985; Hirschman & Holbrook, 1982). However, as the localisation literature suggests, cultural background can be accounted for positively however there remains the challenge to balance between global and local.

Nevertheless, within the management domain, Pullman and Gross (2004) explain that the service designer can design for experience and the operations manager can facilitate an environment for

experience by manipulating key elements. Therefore, understanding these key elements would be beneficial for giving global brands a competitive advantage.

Even within market-based research, Vanhamme et al. (2009) suggest that experiences can either be intentional or unintentional and driven by the firm, the customer, or both. However, Vanhamme et al. (2009) suggest that experiential marketing refers to the strategy of creating and staging offerings for the purpose of facilitating meaningful customer experiences. Vanhamme considered experiences as an important component of a brand strategy. Therefore, it shows that there is an experience element that can be planned for, and it can be effective, even if some parts of the experiences cannot be planned, as they are beyond the firm's control. Therefore, in order to design for experiences meaningfully and focus on the aspects of the experience that can be designed for, a designer must understand the boundaries of experience design.

When Pine and Gilmore introduced the design of experiences they did so in abstract terms. Pine and Gilmore recommended that experience producers follow a principal to-do-list: create events which are unforgettable and are of limited supply, sell the use of a product, not the product itself, put the customer at the centre of attention, activate all five senses, and enable a sharing of the experience (Pine & Gilmore, 1999). Even though Pine and Gilmore believe that their recommendations will indeed produce valid experiences, they do not explain in detail how this is achieved, or how experiences are actually created. Instead, in their writings, experiences seem to occur as a more or less automatic response to a design, a position that has been questioned by various scholars since then (Boswijk et al. 2007).

However, Pine and Gilmore as well as other scholars did acknowledge the importance of the physical context since the term was introduced. They stated that good experience design uses all physical context elements to support an underlying vision, metaphor, or theme (Alben, 1996; Carbone & Haeckel, 1994; Pine & Gilmore, 1998). Effective physical context is concise, compelling, and engages all senses reflected in interior design, employee dress and behaviour, and all tangible props (Pine & Gilmore, 1998).

Suri (2000) also mentioned the importance of context, explaining that experience itself is personal and, though designers can influence it, it cannot be fully designed. Indeed many aspects

of experience - those affected by people's internal states, moods, and idiosyncratic associations or by context - are beyond designers' control. But experience is also influenced by factors that designers do control (this will be discussed in later sections). These formal and behavioural qualities influence people's experiences in complex ways as they are interpreted through various filters of personal, social and cultural meaning (Suri, 2000). Therefore, acknowledging that there are personal, social and culture associations linked to localisation, however localisation literature does not specify practical steps to achieve it in terms of design, rather it states the challenges.

Suri (2000) explains that these factors influence people's experiences anyway, and maybe not in the ways that are intended to do so. For this reason it is critical that designers strive to understand as much as possible about personal, social and cultural influences and interpretations of design elements and their expressions. Only in this way can we be confident that we express design qualities and elements that appropriately shape and support people's experiences in intended and desirable ways. It follows that as much as possible needs to be understood about localisation in order to design meaningfully.

It is clear through literature that experience can be subjective as every encounter leads to an experience. However, the role of management and design is to understand the boundaries that can be manipulated in order to create a positive experience. The context in which the experience happens is also important. While the importance of the physical context has been mentioned since the introduction of the term, however more literature is now addressing the personal, social, and cultural contexts as well tying the latter to localisation literature. Designing for meaningful experience was introduced in abstract, seeing experiences as an automatic response to design including the visitors of the experience being passive. Pine and Gilmore suggest putting the customer at the centre of attention, engaging their senses and sharing the experience as the to do list for creating meaningful experiences ,however the do list created by Pine and Gilmore is not elaborate enough to understand how this can be achieved. Pine and Gilmore suggest a holistic view of the physical space including again the importance of engaging all senses, and paying attention to all tangible props within the context, as well as employees dress and behaviour.

2.5.3. Co-creation

The second-generation of literature goes into more detail on the steps that Pine and Gilmore suggested and adds that experience design is a joint outcome not just created by the designers but it is co-created by the users as well. Experience design in this approach illustrated the mutual constitution of a design and its experience subject during the occurrence of the experience (Strandvad & Pedersen, 2015). As a result of this approach, an experience can be seen as the joint outcome of both the users' individual qualifications and preparations, and the properties of a design. This prompts the need to involve the user in the design process and thus co-produce. This need affected design, as traditionally the designer is focused on the product/service being designed and looks for ways to ensure that it meets the user's needs. The traditional methods included in the design process included research phases, where the researchers collected primary data or used secondary sources to learn about the user's needs. However, in these cases the focus continues to be on the design development of the product/service, and the roles of the researcher, the designer, and the user are distinct, they even depend on each other. If the user is not really a part of the team (Sanders, 2002), then a gap might exist in the communication between these actors. When the user is involved, it is called participatory design. In ideal participatory experience, the roles of the designer, the researcher and the user are mixed, which is what enriches the results (Sanders, 2002).

Therefore, a change in the design process, will change the end result, which is vital information for branding in order to successfully design experiences, as successfully designing experiences proved to be a competitive advantage.

There are examples of co-creation in the production of localised spatial experiences. Sharma asserts that high-end global fashion brands which collaborated with local artists in product creation or retail design elements also provided opportunities for cultural exchange. The global brand can benefit from one-of-a-kind input into its localised range or retail store, while the collaboration with a high-profile brand would provide a spotlight on the local artist. The design of the Primark flagship store in Madrid is an example of this exchange. The global retail designers, Dalziel + Pow, invited collaboration from local ceramists in the creation of tiles inspired by Spanish Moorish tradition to be installed in the retail store. Khan (2021) suggests that such

collaboration provides a financial incentive and a public platform for the local manufacturer and alleviates the retail designer from misinterpreting cultural taste. As a global brand, Primark gains from this exchange: its identity is translated for local taste by incorporating authentic localised retail design elements.

Flagship stores, as an accepted strategic market entry channel for global brands, are noted as the most appropriate store typology for retail design localisation. Flagship stores are experience-focused with the objective of establishing brand meaning and institute consumer connections rather than satisfying a profit motive. As a strategy for localisation, the flagship store catalyses often derelict areas into thriving social hubs. Sharma argues that flagship stores act as social anchors, rather than conventional shopping opportunities. The flagship store, in providing immersive, interactive and entertaining experiences, becomes a source of engagement and social activity for local consumers, while bringing increased value to the immediate local context. In this cultural exchange, the global brand benefits from local consumer interest, while accumulating brand value. The Virgin Mobile flagship store, previously in Braamfontein, South Africa is an example of such. The store was positioned in the City of Johannesburg and partnered with a local coffee brand, providing a cafe and allocated workspace with electricity sockets, for consumers to enjoy as a social workspace. This was appropriate to the store 's urban context and shifted the function of retail from pure utility to satisfying a social experience too.

Khan (2021) is an advocate for co-creation, specifically in the field of retail design and localisation. In the chapter titled "*Local Collaboration in Retail Design: A Strategy for Localising Global Brands*" she suggested designers and/or retailers may consider the following co-creative strategies towards localised retail design: (1) Local designer collaboration: Global retail designers can collaborate with local retail designers for input into localised store design. This is to ensure an authentic representation of local meaning through retail design. Local manufacturer collaboration: Retail designers and/or retailers can collaborate with local manufacturers who can contribute local presence through the installation of unique in-store retail design elements. (2) Global/local brand partnerships: Local designers can be instrumental in identifying global brand partnerships with local brands by initiating collaborations. This may be through co-design of product lines, or in the co-use of retail spaces between global and local brands. In this way, local

taste may find resonance with global meaning through brand associations. (3) Unique flagship-store experiences: Designers and/or retailers can use the flagship store typology as an appropriate channel to elicit unique consumer experiences. In this way, consumers become 'prosumers', co-creating their in-store experiences and making their own meaning (Khan, 2021).

Furthering the idea of participatory design and the importance of the physical context, Capra et al. (2019) looked into the relationship between the products and the environment within the context of a physical environment, looking at a method that helps explore the context during the development and design phase before implementation. They found out that in order to design meaningful experiences, it is necessary to involve the user in the design process, not only by questioning them about their needs and desires but also by providing an environment where they can interact with the product or service under development and imagine themselves in future scenarios in the context of use (Capra et al., 2019). Capra et al. called the method low-resolution prototypes and storytelling. They use prototypes and storytelling as tools for planning and building simulated interactive experiences as a part of an exploratory method of user-centred research. Their results suggest that using low-resolution prototypes and storytelling to create immersive experiences to validate products/services enables a deep understanding about users, which is an important perspective to design, considering that people do not buy products and services, but meanings.

Jane Futon Suri, who did extensive research in the field of experience design, also looked in the importance of involving users through prototyping in participatory design. Jane has a background in psychology and architecture and brings social science-based perspectives to design practice. She pioneered human-centred approaches increasing accessibility of human-centred tools, including publishing the tool "Method Cards". She developed techniques for empathic observation and experience prototyping that are now widely employed in the design and innovation of products, services, and environments, as well as systems, organizations, and strategies.

Suri (2000) suggested that prototyping as a design practice is now promoted within the business community as a key element in innovation. Further, Suri (2000) suggests that as designers of

interactive systems (spaces, processes and products for people), we increasingly find ourselves stretching the limits of prototyping tools to explore and communicate what it will be like to interact with the things we design. "Prototypes" are representations of a design made before final artifacts exist. They are created to inform both design process and design decisions. They range from sketches and different kinds of models at various levels — "looks like," "behaves like," "works like" — to explore and communicate propositions about the design and its context. As such, prototyping is a key activity in the design of interactive systems. Therefore, prototyping is an important tool to enable the end user to experience the product or service before the final artifact exists, which in turn views the user not as passive, but as a co-creator. With physical spaces, the final spatial experience will differ as the context is important, however the prototype allows an exploration before the final result is implemented in order to involve the user from the start. Capra et al.'s low-resolution prototyping allows an exploration of spatial qualities in a more affordable way. Prototyping is fused with storytelling to create a participatory approach that allows for experiences to be designed more meaningfully.

Suri (2000) further underscores the importance of context as the author explains that the experience of even simple artifacts does not exist in a vacuum but, rather, in dynamic relationship with other people, places and objects. Additionally, the quality of people's experience changes over time as it is influenced by variations in these multiple contextual factors. This further explains that prototypes do not give an indication of the real final result however they still help in co-creation, as it is a way of involving the user where the design cannot be implemented for many reasons such as time and budget. In the case of physical spaces, Capra et al. (2019) mentioned low-resolution prototypes – as physical representations of early conceptual models (Kaya, Alacam, Findik, & Balcisoy, 2018) – which enable the creation of a complete simulation environment where users can interact with the product or service that is being designed, validated or tested, and freely express their perceptions. Constructed with basic materials (from cardboard to bottle caps), these materialised concepts have many benefits: for Pernice (2016), with low-resolution prototyping, more time can be spent exploring interactions with the product/service, without technical restrictions.

Prototyping is an activity that has received considerable attention in the design process since the adoption of Design Thinking in several business areas (Elveruma, Welo, & Tronvoll, 2016). The understanding of the design process in the business and development domains has been extended, so using low-resolution prototypes in the early stages of design has become an important practice. In contrast to the traditional role of the prototype in engineering processes, the prototype in the design process, especially of products, has a more exploratory role (Elveruma et al., 2016).

Involving the users from the start rather than witnessing a demonstration or someone else's experience is what Suri (200) calls "Experience Prototyping". This includes methods that allow designers, clients or users to "experience it themselves". Suri adds that one of the basic tenets of the concept is that experience is subjective by nature, and that the best way to understand the experiential qualities of an interaction is to experience it subjectively. Based on that, low-resolution prototyping would be considered a method of experience prototyping.

The works of Suri and Capra et al. show that the tools we use to design, such as prototypes, influence the way we think. Solutions, and probably even imagination, are inspired and limited by the tools we have at our disposal.

The development of design demanded new methods in order to involve the users from the beginning of the design process and throughout. Prototyping is a useful tool, and in terms of the physical experience where prototyping might be difficult to implement in the same amount of detail, there are other ways to involve users (such as low-resolution prototyping and storytelling combined as Capra et al. suggested). However even with these available methods, when we consider experience we must be aware of the important influences of contextual factors, such as social circumstances, time pressures, environmental conditions, etc. and the design of integrated and holistic experiences set in context, rather than of individual artifacts or components. Therefore, there are methods being developed, with many advantages, including understanding the users' emotions and imagining them in future experiences, prototyping might still be somewhat subjective but it is better than seeing the user as passive when it comes to creating meaningful experiences. This also means that there are ways to involve the users despite budget

constraints, giving more changes to localise by involving users from different geographic backgrounds.

As the previous section outlined, experiences are perceived through a personal, social and cultural filter. Even though this can be influenced by design, the experience is still somewhat subjective. Therefore, prototyping and other tools devised by experiential researchers help understand what a selection of users will experience during the design process, in order to better understand what influences experiences at an early stage. Even then though, different people have different filters, therefore, localisation is also important when selecting the team to design the experience and their backgrounds, as well as the users that will experience the prototype and give their feedback in the co-creation phase.

2.5.4. Multi-Sensory

Another exploration of experience design that happened in the second-generation literature is the importance of the role of senses in experiences, as suggested by Pine and Gilmore, which attracted many researchers. Pine and Gilmore suggested the importance of senses specifically in the physical context as mentioned previously, as well as in their abstract to do list for creating experiences (Pine & Gilmore, 1998).

Many of the researchers exploring sensory elements were in the fields of retail and hospitality, and were dealing with spatial design as well as branding. A significant body of research performed in this area shows the connection between sensorial stimuli and physical spaces (Pullman & Gross, 2004; Sloane, 2014; Motoki et al., 2021; Jang and Namkung, 2009).

As the perspective of experiences on marketing shifted from the product to the creation of consumers' experiences, sensory marketing seems to be integral to stimulating excitement and pleasure (Douce and Janssens 2013). Sensory marketing engages and triggers consumers' senses (i.e., sight, sound, feel, taste, and smell) (Krishna 2012). All these five senses elicit emotional responses to goods, services, and the environment with some notable differences such as the sense of sight being most powerful in detecting changes and differences in the environment (Orth and Malkewitz 2008) and the sense of smell triggering the most vivid memories (Fiore et al. 2000). As such, sensory branding influences consumers' perceptions, judgement, and behavioural

responses toward a particular brand (Krishna 2012). As Lindstrom (2010) stated in his book *“Brand Sense”*: a brand’s appeal to consumers’ senses allows them to experience the brand more profoundly and have an emotional connection with it at a deeper level.

Pullman and Gross explored sensory stimuli within experience design as well. In one of their papers they explored the relationship of experience design and eliciting emotions and loyalty in customers in physical settings from a service management perspective (Pullman & Gross, 2004). Firstly, they acknowledge the link between experience design and the service industry, as well the increasing interest in the creation of experiences for customers. Moreover, even though they come from a service perspective, they acknowledge the importance of context for experience design. Pullman and Gross (2004) talk about the spatial qualities, such as the physical and what happens within the spatial experience as the relational, the relational setting where the customer consumes the service and everything that the customer interacts with in that setting. Everything that a user interacts with within a space is what I call spatial experience design in this thesis. Within what Pullman and Gross (2004) call the physical context they suggest the tangible spatial experience is made up of “mechanical clues” such as smells, sounds, textures generated by things which is where sensory stimuli comes in. The relational setting is where “humanic clues” come in, which are behaviours emanating from people. If we consider a holistic view of spaces, how people behave within the space impacts the experience had in the spatial environment. Some parts of this relational environment can be somewhat controlled and designed, such as staff uniform, as Pine and Gilmore explained, while others cannot such as the visitors of the place and their interactions.

Some literature refers to the entire experience that a physical context can elicit with the multisensory elements as atmospherics. From an interior design perspective, Sloane (2014) defines atmospheres as a commonly-used synonym for mood, feeling, ambiance, or tone that a spatial experience elicits. Then Sloane explains that within the context of spatial design however, atmosphere mediates between the built environment and human perception and thus how a space is experienced. Sloane (2014) concludes in the paper that atmospheres, as they are experienced by users later on, arise from a design network which itself is made up of human and non-human actors. Human actors are what Pullman and Gross referred to as relational, while

non-human includes the materials used in what Pullman and Gross refer to as the physical context.

Motoki et al. (2021) also explored the use of multisensory elements within interiors – in particular, they explored the effect of coffee shop interior atmospherics on taste associations. They concluded that multisensory atmospheric elements including the visual, auditory, olfactory, and tactile, have all been shown to influence the coffee drinking experience. Other researchers also explored the role of atmospherics in the context of restaurants. Ryu and Jang (2008) identified a scale of six factors that represent the intangible aspects of the dining atmosphere namely; facility aesthetics, ambience, lighting, table settings, layout and staff. Ha and Jang (2009) identified four factors; interior design, ambience, special layout and human elements. As shown both Rye and Jang (2008) as well as Ha and Jan (2009) both conclude that there are physical and relational elements within a space that influence it.

A parallel concept about the exploration of senses within spatial experiences can also be found in the branding literature. As previously mentioned, experience design is the acknowledgement of the emotions that a product of service can elicit. Therefore the concept on experiences in branding is sometimes called “emotional branding”. Marc Gobé (2006) looks into emotional branding and uses his experience in brand design to explore how brands can and should “engage consumers on the level of the senses and emotions”. According to the author, emotional branding also is “how a brand comes to life for people and forges a deeper, lasting connection”, which is what meaningful experience design aims to do.

In the book titled “Emotional Branding: The New Paradigm for Connecting Brands to People” (2010), Gobé examines an area of branding that he believes has been largely unexplored but is gaining momentum in marketing and plays an important role in emotional branding, which is sensorial experiences. The interplay of music, colour, images, scents, and tastes can create a memorable emotional brand contact that enhances brand preference and loyalty, according to the author. More and more retailers are discovering the impact of the senses on creating a brand personality.

Gobé also links what he calls “emotional branding” to localisation. He describes the unique characteristics of the major subcultures in America and how marketers should be responding to their needs. Latin-Americans, Asian-Americans, and African-Americans represent tremendous buying power he suggests, yet their unique cultures necessitate messages which have personal meaning for these groups and that are tailored to reflect these cultures if marketers are to connect on an emotional level.

There is a dearth of literature exploring further what Gobe suggested in terms of multi-sensory elements in the context of branded spatial experiences. If we look at the olfactory as an example, it has been researched in branding. However, there is a lack of study connecting the sense of smell to localisation and brand spatial experience. From a branding perspective for example extensive literature suggests that smell triggers an immediate emotional response. Also branding literature suggests that today's marketers are conscious about its usefulness in communicating with consumers, leading to the advent of olfactory branding, creating an experiential retail environment having a fragrance to stimulate the overall experience of the consumer. Previously, branding was guided more by audio-visual stimuli but because of tremendous advertising clutter it is becoming difficult for organisations to create a niche. It started with the implementation of sensory branding using all five sensory organs, though observed initially that senses like sight and hearing were extensively used, whereas smell was potentially underused (Chaterjee, 2015; Batista, 2016; Biswas, 2016). From a psychology perspective, Majid (2021) says that cross-cultural evidence suggests that numerous languages around the world express smell qualities more frequently than other cultures. Therefore, for global brands around the world, the link between multi-sensory elements and the localisation of spatial experience design is clear, as senses are perceived differently in different cultures, however there is a lack of literature further exploring this notion.

As experience design is a more a holistic view of spaces, it prompted research into areas that might have been related but were understudied when the profession was limited to interior design. Smell for example, which is still a little-explored sense in architecture and interior designs fields, is the sense most connected to emotions and memory (Neves, 2017), and may

even influence the shopping behaviour of consumers (Romano et al., 2019). Therefore, a holistic view has broadened the view of interior design in other disciplines that will influence it.

2.5.5. Memory

Other than the importance of senses, further research has been dedicated to one of Pine and Gilmore's suggested steps, that of memory. Memory has long been established as an important aspect for brands to consider before Pine and Gilmore suggested it. Bettman (1979) reviewed the theory of human memory and consumer choice from a marketing perspective. More recent literature by Kim and Sullivan (2019) suggests that although brand technicalities may be unmemorable, consumers do not forget how a brand made them feel, which again relates to the idea of emotions suggested in previous literature. As opposed to information such as product attributes, features, and facts, personal feelings and experiences better shape consumers' evaluations of brands (Jenkins and Molesworth 2017; Schmitt 2009).

In terms of how experiences are translated into memory – or the memory formation process – Kim and Ritchie (2014) suggested that five out of seven tested experiences are memorable and impact behavioural intentions: hedonism, refreshment, local culture, involvement and meaningfulness. Even though Kim and Ritchie (2014) come from a tourism experience perspective, as experiences are multidisciplinary and transcend disciplines, these suggestions give us insight into the memory process of experiences overall. This can then be applied to spatial experience design.

Their first factor, hedonism, is consistent with a wide range of evidence, subsequently documented in tourism literature. Hedonism was identified as a major determinant of the perceived value of tourism travel. Moreover, in more recent memorable experience study, Tung and Ritchie (2011) found that positive emotions and feelings associated with these experiences such as happiness and excitement explained the essence of tourism experiences being positively recalled.

The second factor, novelty, showed that travellers tend to choose a destination where there are different cultures and lifestyles in order to satisfy their needs and desires to experience something new. Memory literature reported a strong casual connection between novelty and

memory (Menon, et al., 2000; Fernandez, 2018; Quent et al., 2021). This contrasts with standardisation literature which says that standardisation for global brands provides benefits such as customer familiarity. In line with the concept of novelty and also keeping standardisation literature and benefits into consideration, a balance of both global and local is relevant.

Involvement is another factor that Kim and Ritchie (2014) suggested linking memory formation and experiences. Therefore, co-creation related to memory as the consumer is a part of the process, and the consumer will feel represented with localisation.

Moreover, in terms of social interaction and local culture, researchers found that experiencing local culture makes travelling more memorable. In this context, Kim and Ritchie (2014) mean a differing culture of that of the visitor. However, this means that global brands can also take advantage of the fact that tourists will also be drawn to localised spaces as they also want to experience the local culture, not just the people from that geographic context or setting.

This last point is meaningfulness, which is a sense of physical, emotional, or spiritual fulfilment rather than pursuing more escapism or a hollow search for authenticity. Furthermore, Sherdoff, offers a more design-relevant definition to meaning in the experience design. Sherdoff (2001) refers to the same concept of deriving meaning as “takeaways”. Which is what you take away with you from that experience. As the previous literature suggested, mechanics are forgotten but the feelings remain. He adds takeaways are another exercise that helps us derive meaning from the things we experience. Sherdoff is the author of the book titled “Experience Design” and believes that experience design is the intersection of today’s design disciplines. Sherdoff (2001) comes from an experience design with a marketing and product positioning perspective, but Sherdoff provides not only a way of designing online experiences, but also, and more importantly, an approach to all design, whether it be of products, services, environments, or events. Sherdoff defines meaning as:

“Meaning is the deepest connection that you can make with your audience/user/customer. Meaning is established between people, between people and objects, people and places, etc., and it is the deepest part of those invisible connections.”

In a video presentation delivered at the “Interaction 10” conference, Shedroff discusses a six-dimensional framework for experience, shown below in Figure 6:

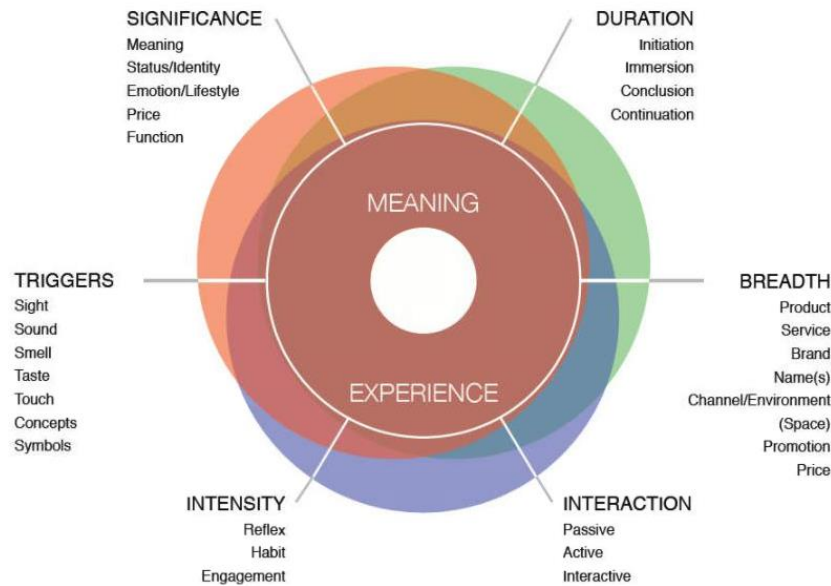


Figure 6: Shedroff's Experience Framework. Source: Shedroff, 2010.

The framework visualises most of the previously discussed literature and sums it up in a visual diagram. As Shedroff outlines, meaning can be derived for several aspects including triggers which are multisensory, the involvement within the experience (interaction), the brand associations as breadth, the duration of the experience, and the significance which is where emotions and meanings come in.

Shedroff has also found fifteen core meanings that are universal – everyone in the world understands what they are and what they mean. These include: accomplishment, beauty, creation, community and freedom, to name a few.

Shedroff’s core meanings correlate with branding literature looking into brand mantras. Brand mantras are short three to five word phrases that capture the irrefutable essence or spirit of the brand positioning. Their purpose is to ensure that all employees within the organization as well as external marketing partners understand what the brand is most fundamentally to represent with consumers so that they can adjust their actions accordingly. The influence of brand mantras, however, can extend beyond these tactical concerns. Brand mantras may even guide the most

seemingly unrelated or mundane decisions such as the look of a reception area, the way phones are answered, and so on. Brand mantras must consider the core meanings that are universal, and also the holistic view of a brand, as the mantra has to be reflected internally and externally.

In terms of retail design, brand mantras are represented by symbolic meanings translated by the retail designer into spatial design (Dennington, 2017, p. S602). These meanings resonate with consumers in the form of spatial cues (which could be aesthetic, experiential, sensory, or other), finding familiar ground with the cultural frames of references with which consumers identify. This is a process whereby meaning is made, consumers find connection between themselves and the spatial identity, and, in turn, retail brand which is reflective and informative of their cultural capital (Dennington, 2017, p. S603). In this way, retail designers analyse, and translate consumer tastes through the design of stores, which connect with their inhabitants on meaningful levels. When consumers visit a store, they are exposed to a selected set of meanings assembled and translated by the retail designer by means of the spatial design (Königk, 2015).

The mantra does not change however the spatial cues change, in order to adapt to different culture within localisation thus achieving a balance between global and local. The marketing of global brands also balances satisfaction of increasing consumer demand and protection of brand status and exclusivity (Dubois and Paternault, 1995, Kapferer, 2014). Hence, retailers' international strategies are largely based on a mix of both global and multinational approaches (Goldman, 2001). Brand communications seeking cultural congruity with consumer preferences in a particular region may incorporate local cultural values, national symbols, colours, symbols, artifacts, and myths (Westjohn, Singh, & Magnusson, 2012).

Servias et al. (2021) even dedicated research to exploring the universal core meaning of warmth. They suggest that research has shown that cultivating perceived warmth has tangible benefits, including increased customer loyalty and purchase intentions. For example, brands high in warmth – such as Snuggle and Tentree – tend to elicit more admiration than brands low in warmth, which increases brand loyalty and purchase intentions.

In term of localisation, Khan (2021) adds that the designer is responsible for mediating brand identity as a form of cultural capital, and translating this into formats desirable to the target consumers through the design of the retail store. The retail designer analyses consumer tastes, aspirations and ideals and encodes this into spaces layered with meanings tailored for the tastes of the brand's target consumers

However, when this is practically applied in design, in formulating their own definition of culture, the retail designer's interpretation may be seen as a gaze; representing a diluted, 'worldly' version of complex cultural systems ideally understood from within (Osman, 2017). This raises questions regarding the authenticity of cultural representation, as risks of cultural appropriation through exploitation (direct use of cultural symbolism) and transculturation (a blend of multiple cultures) (Rogers, 2006, p. 477) are heightened. In her study of retail design localisation of high-fashion global brands, Bhakti Sharma (2016) recognises collaboration between local actors and the global brand as a culturally-responsive means of achieving localisation.

2.5.6. Storytelling

As Shedroff suggested, in order to create meaning, the duration of the experience has to be taken into consideration which includes what he calls initiation, immersion and conclusion, much like storytelling.

Literature in branding also correlated with Shedroff's inclusion of storytelling in experiences. Humans are natural storytellers and are aware of stories in nature (Nehaniv, 1999; Granitz and Forman, 2015; Kao, 2019). Many existing studies have suggested that brand storytelling is useful for building strong brands and brand loyalty because it has the power to persuade consumers, entertain them and imprint a brand in their minds (Fog et al., 2005; Woodside, 2010; Lundqvist et al., 2013; Gensler et al., 2013; Freeman, 2014; Feng, 2018).

Brand managers aim to use powerful brand stories to build a strong brand by imprinting positive brand image and information in consumer memory (Srivastava et al., 1998; Gensler et al., 2013). Stories have a structure that engages listeners. Brand stories also contain a chronological sequence as well as a plot, characters and causality (Delgadillo and Escalas, 2004; Woodside,

2010; Solja et al., 2018). A brand story not only enables consumers to emotionally connect to the brand (Kim et al., 2016; Dessart and Pitardi, 2019; Kao and Wu, 2019) but also expresses the brand's value (Fog et al., 2005; Gensler et al., 2013), thus fulfilling one of the requirements of experience design, which is meaning and by means of emotions.

In branding literature, Rodriiguez (2020) suggests how to practically apply the concept of storytelling in branding. Rodriiguez (2020) suggests that a story needs to have a theme. Rodriiguez suggests happiness, empowerment, inspiration, etc. as feelings we can all relate to as humans, and if a brand story can strategically drive these themes across its business, it will succeed in connecting with its audience. This relates back to Shedroff's suggestions in experiences that all humans can relate to certain concepts, showing that branding and experience design are parallel concepts.

Rodriiguez (2020) gives the example of the Coca-Cola brand as a brand driven by experiences. The company has clearly articulated the fundamental experience it wants to impart to customers: happiness. Rodriiguez (2020) suggests that through one of their touchpoints, the website, Coca-Cola's conveys that this is the company's purpose. Rodriiguez (2020) suggests that sometimes an experience is as simple as reminding people about your mission and purpose, but it has to be something that's not only relevant but also engaging and compelling (similar concepts to those of Pine and Gilmore).

However, even though the core meaning might be universal, translating the core meaning into a tangible spatial experience could be miscommunicated, as some sensory aspects may have different meanings in different cultures. For example colour is an integral part of products, services, packaging, logos, and other collateral and can be an effective means of creating and sustaining brand and corporate images in customers' minds. Through an eight-country study, Madden et al. (2000) explored consumers' preferences for different colours and colour combinations. The results show cross-cultural patterns of both similarity and dissimilarity in colour preferences and colour meaning associations.

2.5.9. Furthering the journey of experience design

Expert researchers who extensively study experience design (such as Hassenzahl, Suri) suggest that experience design needs further research, especially in practice.

Hassenzahl suggests that while the notion of user experience has certainly evolved over the past 20 years – maybe a little more in academia than among practitioners – the journey is not over yet. In the paper by Hassenzahl et al. (2021) titled “*User Experience Is All There Is*” it is suggested that while the recent years inspired a huge amount of models, methods, case studies and empirical exploration of positive user experience, this work does not seem to have the impact on design that it should. However, while interest is high, positive design approaches are only rarely implemented. That is why in the next section I look into literature from design and brand management to see if any documentation of the practice of the view of experience design has been implemented. Keeping experience design boundaries in mind will help identify whether literature exists that carries the same concept under possibly different titles.

Hassenzahl et al. (2021) adds that to design for positive user experience, companies have to adapt their design and development processes. Suggesting that in many cases, design for positive experiences is treated as an additional requirement to already existing requirements, for example, when designing software for workplaces, the task comes first and only then is design for meaningfulness considered. Hassenzahl et al. (2021) explains that this additional work has to be integrated into the development process and into a project’s financial calculation. If this is the first project integrating positive user experience, the design and development team needs appropriate training. This requires additional effort and resources, even if the companies are interested. This limits the interest in positive experience to quite saturated markets, where this could make a difference.

Hassenzahl et al. (2021) suggest that the hesitation to change development processes has an impact on user experience professionals. They suffer from a lack of knowledge and methods as well as insufficient project budgets and time management. In addition, Michael Burmester and Magdalena Laib found several obstacles in the design practice itself. One central problem is that many designers still understand design for positive experience as an add-on. To design for enjoyable or meaningful work seems to have no intrinsic value, at least from the management

perspective. In addition, designers are still very much problem-driven. When running design workshops, for example, Michael Burmester and Magdalena Laib introduced the theoretical background, provided an overview of methods, and presented design studies. After this, Michael Burmester and Magdalena Laib asked participants to imagine a possible design for positive experiences in a given domain. Very often, however, the designers restrict themselves to ideas to make a product more efficient or to solve an especially pragmatic problem. Michael Burmester and Magdalena Laib say that a reason for this could be that designers are traditionally trained to find solutions for problems to reduce negative experiences.

In other words, many designers (and their companies) have no clear understanding about what positive experiences are supposed to provide. They focus on form and function and leave the experience to their users, echoing how scholars suggested the experience can be planned or unplanned. However the purpose of design in the experience design is to affect the experience in a positive way and plan it.

Hassenzahl's exploration of experience design suggests that experience design has developed more in literature than in practice. This is due to several reasons including failure to adapt experiential design development processes and no clear answers on what a positive experience should provide.

Designers are now challenged explicitly to help companies explore and visualise directions for their future offerings that evoke and support specific qualities of experience. So the work of design today is increasingly to bring skills, creativity and insight to determining 'what's right to design' in support of business objectives.

As previous literature has suggested, experience design is multidisciplinary because of the holistic view of people and experiences. Multiple disciplines are needed to solve the design problems of today (i.e. interaction design, industrial design, designers of environments, human factors specialists, mechanical and electrical engineers). Each discipline brings a unique understanding of the issues at hand and an individual approach to solving them. To work effectively as a design team it is important to develop a common vision of what the team is trying to bring into being.

Therefore, Suri suggests it is a powerful asset to have tools and techniques that create a shared experience, providing a foundation for a common point of view.

Suri further explains the need for tools and techniques in experience design as these bring new opportunities but also new challenges. She suggests that one of the key areas to prompt development within the practice of design is “understanding what matters”. As outlined previously, to design with people’s experiences in mind we need to better understand what qualities matter to the people we are designing for and the ways that design can enhance their experiences. This involves learning about a broader range of activities, thoughts and feelings than when designing singular objects. Designers need to be more broadly aware of people’s goals, aspirations, rituals and values; personal, social, cultural and ecological contexts; the processes and interrelationships between different features, elements and objects within these contexts. These challenges spawn new ways of acquiring relevant information to inspire and inform design including ethnographic research, and customer research.

Another key area that Suri suggests prompts developments is “communicating experiential ideas”. She further explains this need, stating that design teams nowadays frequently involve professionals from interaction design, industrial design, engineering, architecture, human factors, business, marketing and branding, each of whom bring unique and important skills and perspectives. Additionally, she states that decision-makers within a client organization usually involve representatives of multiple business functions. Both to work effectively together and to enable sponsors to grasp the value of specific design ideas we are exploring more effective ways to communicate experiential ideas, through more dynamic, context-based and multi-sensory engagement. Suri suggested experience prototyping and human centered design as answers to this challenge.

Suri therefore adds to the challenges that Hassenzahl mentioned, including furthering the idea of better understanding positive experiences, adding that these experiences must also be well communicated. Suri provides tools and techniques to better understand and communicate positive experiences including ethnographic research, and experience prototyping.

Moreover, Virpi Roto also found challenges by exploring the area of experience design. She is the founder and the first chair of the Experience Research Society, a global network of experience researchers and professionals across many disciplines.

Roto et al. (2021) explain what has been already explained by reviewing literature which is that human experiences have been studied in multiple disciplines, Human–Computer Interaction (HCI) being one of the largest research fields. Roto et al. (2021) further explain that currently, there is little interaction between experience researchers from different disciplines, although cross-disciplinary knowledge sharing has the potential to accelerate the development of user experience and other experience research fields to the next level.

Roto et al.'s (2021) research titled *“Mapping Experience Research across Disciplines: Who, Where, When”* studies the experience literature across disciplines to better understand the position of user experience research on the map of experience-related sciences, to identify relevant work, to learn from human experiences, to adopt existing research methods and measures to study human experiences, and thus, to accelerate the maturation of user experience research. This serves to reveal the big picture of experience research, thus mapping experience research across all disciplines.

Roto et al. (2021) conclude that various disciplines address experiences from different perspectives and for different purposes, we therefore need to understand experience as a multi-disciplinary concept. Roto et al. (2021) point user experience researchers to new areas of study across the experience research fields, although the specific interests and needs of researchers will differ. Learning from other disciplines would accelerate the development of many experience research fields. Roto et al. (2021) suggest that their research profiling study can be seen as a starting point for a series of studies to establish a more coherent experience research community, and they hope their article helps experience researchers identify relevant disciplines in experience research, and to begin co-developing influential concepts, theories, and tools to support experience research across the various disciplines. Based on the high cross-disciplinary interest in the field of user experience, they see a high potential in continuing this work towards a more integrated future for the important and quickly growing field of experience research.

At the same time, other authors posit that to move the experience design field forward, increased collaboration needs to occur across approaches and contexts, and between professionals interested in designing experiences (Chen, Scott, & Benckendorff, 2017). This is what this thesis does, it brings the interdisciplinary knowledge and connects spatial design to experience design and brand management. The increasing need for inter-disciplinary engagement with the fields of industrial design, psychology and computer engineering also encouraged scholars in the field of retail design to encourage changes in the field. Subsequently, Teufel & Zimmerman (2015), plead for a new generation of retail designers who approach the design process in a holistic way. In terms of the localisation of spatial experiences, in the specific context of branded spaces, Khan's (2021) suggestions in furthering experience design also apply to the practical application. Khan (2021) suggests that through localised retail design, global brands intend to translate their brand offering in ways that relate to local consumers. Although localised retail design is a positive step towards addressing local conditions, it can result in cultural pitfalls if implemented superficially.

Therefore, it is clear from Hassenzahl, Suri, Roto and Teufel & Zimmerman's research into experience design that the area of experience design can be developed further. They suggest that this multi-disciplinary field needs to be better understood and more interconnected through disciplines, with methods and tools to enable better communication across designers and organisations. Findings in retail design also reflect a need for practitioners whose knowledge goes beyond the creation of functional and aesthetic store environments (Claes et al. 2016).

However, it suffices at this point to state that there remains a lack of consensus when describing different types of experiences. Terms such as "meaningful" or "memorable" have frequently appeared in the literature without clear conceptualisation, making it difficult to determine how these types of experiences differ (Duerden et al., 2015). Scholars in both experiential, localisation, and retail design fields agree that pitfalls exist in the way that practitioners apply the theoretical concepts, because of the lack of changes in the design process and considering a holistic view, and implementing localisation authentically.

The previous sections outlined the evolution of the field of interior design into spatial experience design, and the need to localise these spaces, especially when it comes to global brands and their retail spaces.

2.5.10. Conclusion

The evolution of the field dealing with physical spaces, especially those catered for global brands, calls for a more localised as well holistic view of spaces, and therefore to include many complex factors that a brand team must consider. Amongst the complex factors is the need to localise meaningfully and not superficially, involve the users in the design process, understand the experience design boundaries, and deal with the multidisciplinary nature of the requirements.

Experiential researchers such as Hassenzahl and Suri suggest that experience design is looked at more in literature rather than in practice. Hassenzahl suggests that organisations do not fully understand experience and have not altered their design development process because of the nature of the training of the designers, which needs to change in order for experience design to be better implemented in practice, while Suri focuses on the challenges that designers face in terms of context and understanding the users' emotions in order to better experience design. She also suggests altering the design process in order to consider tools that help the user visualise the experience before it is implemented for better co-creation.

Retail design researchers also found similar challenges when it comes to implementing experience design within the context of branded spaces. Teufel and Zimmerman suggest a new generation of designers that approach design in a holistic (multidisciplinary) way. While Khan suggests, especially in the context of retail design and localisation, that current spatial experience designers face a pitfall of implementing localisation superficially.

Therefore, most of the recommendations from the literature on experience design, retail design, as well as localized retail spaces call for a change in the way that design is managed and approached within brands. Rather than looking at the end results and analysing them, the suggestions advocate meaningful localisation and changes in the design process.

2.6. Management of Experiences

Researchers' in the field of experiential design, retail design and localisation have recommended that the management of the elements related to localised spatial experience design could use more development, as they suggested changes in the design process, and involvement of potential users. Therefore, this section looks at the design management literature in order to identify the gap that addresses localised spatial experiences, which this thesis will explore.

2.6.1. The Need for Design Management

As can be seen in the previous literature discussed, in terms of localising spatial experiences, the brand has many layers to consider. This includes different touchpoints and their correlation, multidisciplinary teams, meaningful localisation and experiential qualities, which all have to be considered by the brand within their spatial context in different geographic locations and contexts. Therefore, design management is needed in order to strategize all these different complex layers.

In terms of the multidisciplinary teams for example, Suri (2003) adds that in order for the team from different disciplines to work together effectively it is important to find ways to develop a common vision, which is where management is important. Best (2010) adds that the contributions of the different teams members to a given project may be made as individual, as part of a multidisciplinary team or as part of a larger collaborative or collecting working process enabled by new technologies. Therefore, Best identifies that the different ways of team makeup and contribution can affect the outcome.

As Suri explains, management is important, in this case design management, because design is an important part of any global brand today. Designers can understand, shape and communicate new, innovative products and can visualise brands, but design always needs to be harmonised and carefully associated with a firm's approach and core capabilities, this describes the design manager's job (Hands 2008). It has been established that the way design is managed within organizations can have a huge impact on whether a brand succeeds or fails (Hands, 2008; Dutta, 2012; Best, 2010). In recent years, the increasing complexity of projects and a growing market competition, as well as the need to localise, have significantly increased the pressures to improve

design performance. Design management as a body of knowledge has therefore emerged, aiming to better understand and tackle some of these issues.

2.6.2. Defining Design Management

The Design Management Institute defines design management as “the on-going processes, business decisions, and strategies that enable innovation and create effectively-designed products, services, communications, environments, and brands that enhance our quality of life and provide organizational success.” (DMI, 2022).

Design management ranges from the tactical management of corporate design functions and design agencies (including design operations, staff, methods and processes), to the strategic advocacy of design across the organisation as a key differentiator and driver of organisational success. It includes the use of design processes to solve general business problems. Therefore, it is the favoured channel in order to address the issues suggested by experiential and retail designs in the matter of localisation in spatial experience design.

The Design Management Institute provides some examples of professionals that practice design management such as design department managers, brand managers, creative directors, design directors, heads of design, design strategists, and design researchers, as well as managers and executives responsible for making decisions about how design is used in the organisation.

Therefore, branding, design and management have already been linked in practice, as well as evidence suggesting even in literature, thus fulfilling an aspect of interdisciplinary need in the field of experience design. This section will take a look at the literature in fields of management to assess whether localisation of spatial experience design is also addressed, or if any parallel gaps exist.

2.6.3. Challenges in Management Literature

Similar challenges of the implementation of experience design can be found in the management literature. The root of the issues in terms of experiential design is the gap between literature and practice. There exist many theoretical concepts on how to practice experiential design, however the design process has not evolved to incorporate the changes.

Rossman and Duerden are researchers looking into experience design management and offer some insight into the challenges to managing the designing of experiences. They stated that fully positioning an organization for success within the experience economy remains a strategic issue that many executives have difficulty solving. Rossman and Duerdon also add that in response, most sectors have had to review their processes to address the evolving demands associated with what is referred to as the 'Experience Economy'. As stated before, this added yet another level of complexity to on-going developments in communication technologies, and the need to localise. As people are continuously connected to new sources of information, they become more critical, value conscious and demanding.

Much like the superficial application of localisation, experiential management authors J. Rossman and Duerdon add that experiences can be done superficially or inauthentically. The authors suggest that some organisations are applying the word "experience" to their products, services, or job titles, however, they are not truly addressing experiences. They describe these attempts as superficial, and will not help the organisation in transitioning to the experience economy, because of the customer-experience gaps that persist. The experiential management theorists refer to the study of Bain and Company researchers, who found that although 80 per cent of surveyed companies reported that they delivered high-quality customer experiences, less than 10 per cent of those companies' customers agreed. No matter how successfully a business thinks it is performing, when it comes to experiences, what the participants in the experience think matters most.

What customers think is what matters most and that is why much has been researched about customers' viewpoints in the management, marketing and experience literatures. However, the responsibility of bringing the reality of what has been researched into the authentically localised spatial experience design, and in the case of global brands aligns with their brand values as well lies with the designers. There are many layers, and brand managers turn to designers to assist them in this complex task. They do, however, expect these designers to design a brand-appropriate experiential store concept that is also localised. A lot have been written about customers and retailers taking on experiential retailing, however not much literature exists about designers' and managers' processes. The need to address evolving

demands and complex tasks of authentically localising spatial experiences must have brought adaptations to designers and managers in global brand practices, however not many studies reflect that.

2.6.4. A glimpse Into the Design Management Influencing Factors

Seeing as little has been written about the process of localisation of spatial experiences within organisations from a design management perspective, the following section will bring together what is available to will help look into this topic. This includes the factors that affect designers and managers when localising spatial experience design, such as team locations, design team models, etc.

a. Team Location

Global brands choose to distribute their teams in different ways around the world, and the team can communicate and collaborate across different geographic settings and contexts thanks to advances in technology. This would have both positive and negative effects on how the spatial experience design is localised, as the literature has shown.

In terms of how design teams are organised, the increasingly global business environment has resulted in organisations using global teams to manage this complexity (Lane, Maznevski, Mendenhall, & McNett, 2004). Among the different types of global teams are globally distributed teams (GDT). A GDT is defined as a group of individuals: (i) belonging to one or more organisations; (ii) interdependent and driven by a common purpose; (iii) using technology-supported communication more than face to communication; and (iv) are based in different countries (Mattarelli & Tagliaventi, 2010). In what concerns the localisation of spatial experience, this means that the global brands have the chance to include people who know the culture of a specific geographic context or setting in the team. However, it also means that there could be challenges in terms of physical distance and time zone differences, but also challenges stemming from cultural differences.

As the movement of decolonising design suggests, the work designers make is inspired by taste, and taste is often derived from what we're exposed to during our upbringing. Therefore, the location of the team members has an influence on how the design is localised.

b. Design Team Models

One of the important decisions that global brands also need to consider is the important decision of whether to outsource their design functions or to perform them in-house.

Hands (2008) specifically identifies three commonly-agreed models for managing design within an organisation. Hands notes that the first is to include an in-house design unit, the second is to employ an external design consultancy on a short-term basis, and the third is a combination of both routes. The following visualises Hands's (2008) three different models:



Figure 7: In-house design diagram. Source: Hands, 2008.

In-House design: A dedicated in-house design facility situated at the core of organisational activity, managing the newly developed product and its ultimate success.

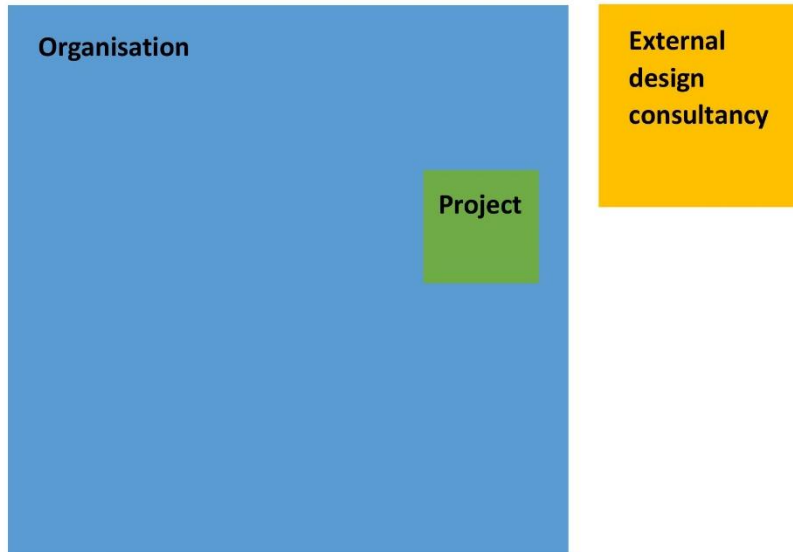


Figure 8: External consultancy design diagram. Source: Hands, 2008.

External consultancy: The external design consultant is predominantly engaged on a short-term project-by-project basis.

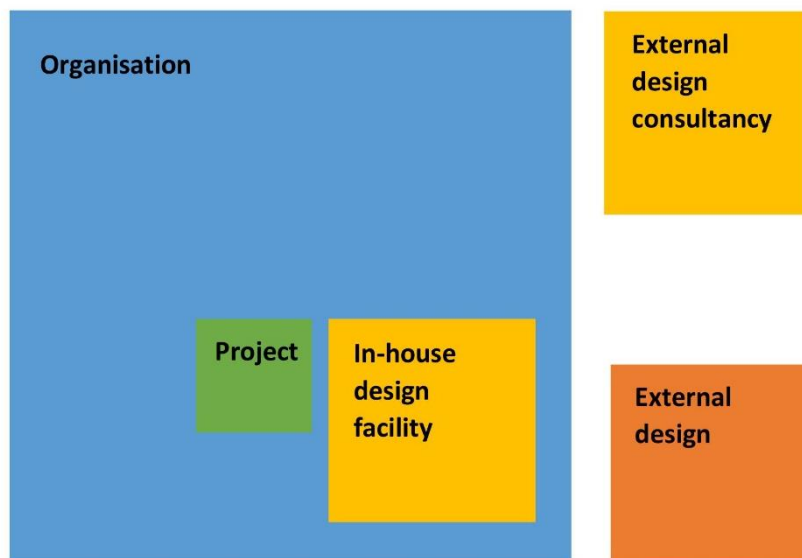


Figure 9: Combination design diagram. Source: Hands, 2008.

Combination: When the in-house design function requests the specialist expertise of an external design consultant for a complex or highly-specialist design project. Usually, this relationship is short-term and the ultimate project responsibility lies with the internal design manager.

There is a lengthy and continuous debate about the benefits of in-house versus external designers.

Hands (2008) suggests the benefit of in-house design teams is the closer working relationships, which means better communication across the different departments in the company, and a lower risk of project failure. Moreover, Munsch (2004) explain the benefits of outsourcing design, stating that it allows organisations to draw from a larger pool of creative talent, which can result in many added benefits such as designers having a diversity of ideas and views reaching considerably beyond an internal corporate perspective, as well as the flexibility to fit them to their area of expertise and passion.

Hands (2008) also highlights the benefits of the other models. Suggesting that utilising an external design can add fresh and innovative ideas and solutions to long-standing and complex problems that the in-house design team may have overlooked. Therefore, an external consultancy can work together with an in-house design team when needed to bring in new ways of thinking. External design input can also be used when further assistance is needed, such as completing the project within a set timeframe and a specific budget. Bruce and Morris (1998) also suggests that a blend of in-house and external design expertise appears to overcome problems and builds on the positive aspects of each situation. However, Hands (2008) highlights concerns with such arrangements, for example the integration of the in-house and external professionals has to be managed carefully to ensure that they are truly working together. The potential pitfalls of giving away commercially-sensitive information and the need to build up an open and trusting relationship are both particularly acute.

c. Team Disciplines

As discussed in the experience design literature, experience design is multidisciplinary. Therefore, a multidisciplinary design team is needed to design for experiences. However, as Hazzensahl suggested, most designers are not trained to incorporate the evolutions of experience design, and many designers are still trained in a specific design field such as interior design, or graphic design. Therefore, an important factor that could potentially contribute to the management of design is the selection of the multidisciplinary team skills and training.

This further strengthens Best's (2010) emphasis on multidisciplinary teams. While Hands (2008) also suggests the nature of the multidisciplinary teams explaining that designers work alongside other specialists, such as marketers, engineers, social scientists, which necessitates an understanding of the wider context in which design operates such as commercial business and societal change. Hands (2008) also emphasises the importance of the correlation of the design team with the marketing team explaining careful and continual dialogue with marketing, market information can be intelligently and creatively managed to enable the designer to focus upon designing products and services that appeal to the specific market segments, thus offering a sense of delight and value to end-users in an often saturated marketplace.

d. Team Cultural Backgrounds

The co-creative design literature discusses the challenges faced when working with a team comprised of people with different cultural backgrounds. Halskov and Christensen (2018) explain that two pertinent cross-cultural issues frequently arise in collaborative design relating to design team cultural heterogeneity, and designing for a cross-border audience. This is because products and services are often designed in one country, but marketed and traded in another, and in this new international marketplace, the adequate understanding of cultural characteristics of users have become increasingly important (Rau, and Choong 2013). Furthermore, in large corporate settings, collaborative designing very frequently takes place in culturally-heterogeneous teams, which may lead to new team perspectives, but also challenges with respect to collaboration and mutual understanding.

Moreover, several researchers have investigated social encounters in cross-cultural design teams. For example Jordan and Adams (2016) have identified a set of factors, which contribute to virtual cross-disciplinary collaboration in large multidisciplinary design teams. While Vestergaard, Hauge, and Hansen (2016) have studied how the use of personas in helping overcome the cultural distance between European designers and Indian users to understanding the users' needs, values and interests. In the domain of product development, Anderl et al. (2009) identified a set of challenges encountered in intercultural teamwork. The differences in terms of practically applying design include preferences of communication style (how much context is needed in communication), anthropometry (body sizes and associated characteristics), user

cognition (perception, searching for and organising information, temporal and spatial cognition, approaches to problem-solving) and of course language (see Plocher, Rau, and Choong (2012) for an overview).

Cross-cultural design results from cross-cultural collaboration between different geographic contexts and settings and the brand origin, but cross-cultural design raises a number of issues. Among them is the question of hegemony, wherein one culture is thought to have greater cultural power than another, whether because of economics, politics, social standing, or other reasons. As such, discussions of cross-cultural design rely heavily on the theoretical discourses of colonial or post-colonial criticism (Halskov, Chirstensesn, 2018). Questions on weather this is genuine diversity, or rather further domination by Western, and above all American, cultures arise.

Aside from design, management in a cross-cultural environment general also poses some challenges according to Steers, Nardon, & Sanchez-Runde (2012). They suggest that there are different types of managers, each with their own set of challenges. However, it is important to remember that they represent overlapping categories.

Table 1: Types of managers and the cultural challenge each type poses.

Type of Manager	Cultural Challenge
Expatriates: Long term face to face management. Where the manager either resides in a foreign country, or brings expertise to a foreign firm.	Overemphasis on local or regional issues at the expense of global issues.
Frequent Flyer: Short term face to face management, where managers with certain expertise are flown in.	Over-emphasis on global issues and corporate objectives at the expense of local customs.

<p>Virtual Manager: Virtual or remote management, where management is performed via information networks and digital technologies.</p>	<p>Ignorance of the impact of cultural differences on local uses of information technology.</p>
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2.7. Discussion

Figure 10 below illustrated all of the interrelations that were discussed in the literature review. The table also illustrates a summary of the interlinks between the different fields.

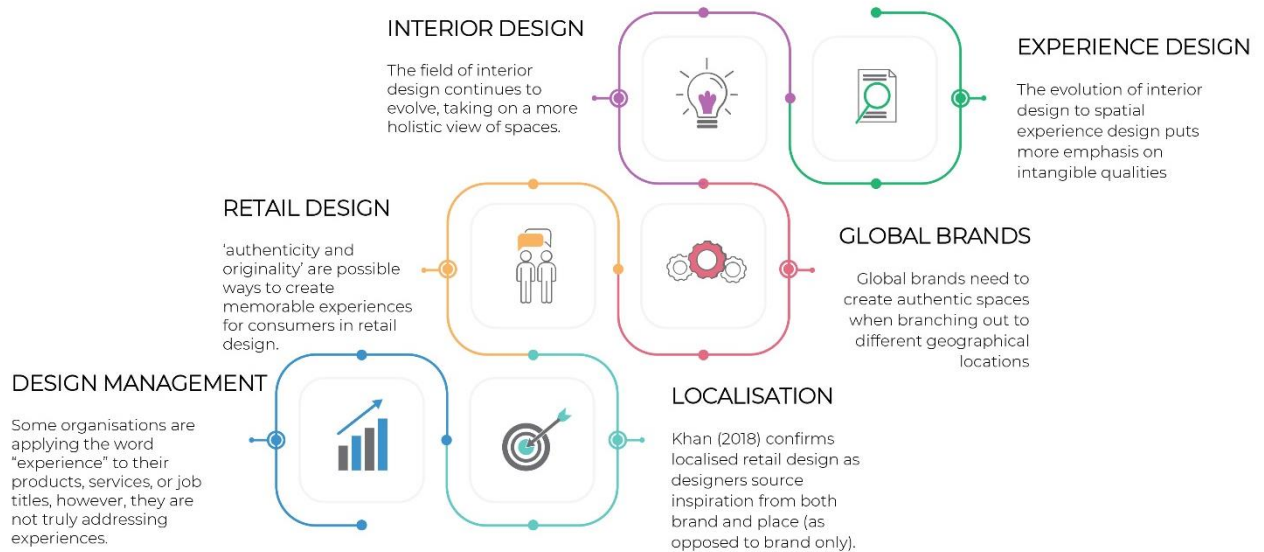


Figure 10: Summary of the interlinks between the related fields.

Table 2: Interlinks between the different disciplines.

Fields	Summary of Interlink
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Interior Design → Experience Design	Advocating for a more holistic view of spaces and a focus on tangible and intangible qualities
Interior Design → Localisation	Advocating for a more holistic view of spaces and a focus on tangible and intangible qualities
Experience Design → Design Management	Similar challenges in noticing that there is a gap in the proper application of theoretical ideas in practice
Global Brands → Localisation	Localisation helps apply most of the qualities encouraged in experience design which global brands can benefit from in terms of creating a competitive advantage

2.8. Conclusions

This chapter reviewed the current understanding of the management of spatial experience design within global brands by bringing together a breadth of diverse areas in interior design, experience design, global brands, localisation and management literatures. Within the content of the review, it establishes the evolution of interior design to reach spatial experience design, and examines the need for design management to address meaningful localisation. It also identifies the knowledge gap that this research project aims to bridge.

The literature review offered a number of factors to be considered when designing localised spatial experiences, including the boundaries of experience design and what can be designed for, as well as the benefit of localisation in addressing the suggested boundaries. These observations include gaps in understanding how the process is managed in terms of practical application rather than theoretical investigation. Moreover, there is a lack of research on the particularities of adapting spatial experience design to different geographic settings and contexts. This highlights the critical gap in bringing together disparate pieces of the different

fields of design, experiences, localisation, branding and management. Finally there has been minimal attention paid to the adaptation of the design process to suit experience design, specifically in what concerns global brands where localisation is an important competitive factor.

Chapter 3: Methodology

Research can be considered a systematic process of enquiry, seeking to develop or contribute to transferable knowledge. This chapter presents the underlying methodology and methods of the thesis. It begins with a review of the research philosophies and assumptions and offers justifications for the adopted methodology. The research methods employed provide the systematic means by which the research is conducted, while the methodology provides the rationale and philosophical assumptions that direct the use of those methods. In order to reach the research objectives, a number of applicable methods have been identified. This chapter presents research approaches that could be adopted in order to secure the aims and objectives that were presented in the introduction. Each part of the methodology is then explained in further detail; the preliminary interviews, the case studies, Delphi surveys, and the development and testing of the creative toolkits. The chapter also describes the samples involved, the study procedures, and the analysis of the data collected.

3.1. Research Philosophies and Assumptions

This section starts by explaining the classification of the research being conducted within this thesis. It then explains why the approach to research chosen was seen as most appropriate. The section concludes with a discussion of the interpretivist approach to the research.

In the foundational text, *“Real World Research: A Resource for Social Scientists and Practitioner-Researchers”*, Robson (2002) argues that research can be classified into four different categories: descriptive, emancipatory, explanatory and exploratory. Descriptive research, as Robson (2002) defines, clarifies a task when sufficient information is already known about the topic. Emancipatory research is a research perspective of producing knowledge that can benefit disadvantaged people. Explanatory research is an attempt to connect different ideas and to understand different reasons, causes, and effects, whereas exploratory research provides insight into an area that is particularly unclear (Robson, 2002). The present research enquiry is classified as exploratory, as the purpose is to explore the processes used by global brand teams when adapting their spatial experiences to different geographic contexts, which is a growing issue in professional practice but is still understudied in research. For such exploratory research, I started with a general problem that was not well understood and used this research as a medium to identify issues that could be the focus for future research. I was willing to

change my direction as new data revealed new insights. The advantage is that exploratory research offers flexibility and can adapt to changes as the research progresses, which was required for the topic at hand.

Beyond general categories of research, Frayling (1993) provides a useful starting point for understanding the different approaches to design research. Frayling's (1993) original conceptualisation of approaches to design research include research for, into and through design. He explains that the *research for* design is practice led and typically results in an artifact. *Research through design* is practice-based and includes development work, material research and practical experimentation. *Research into* design is based on theoretical investigations including a variety of social, economic, political, cultural, iconographic, technical, material and structural topics. This research looks into the cultural implications of spatial experience design, and aims to develop a framework to help better design processes. It does not result in any artifact, nor does it examine the physical aspects that directly influence, design such as the development of new materials. Therefore, this research falls under what Frayling referred to as *research into* design.

As for the general dichotomy between quantitative and qualitative research, given that this research explores a social phenomenon, focusing on understanding processes used by global brand teams when localising, the adoption of a mixed-methods approach was seen as appropriate. Mixed methods research represents research that involves collecting, analysing, and interpreting quantitative and qualitative data in a single study or in a series of studies that investigate the same underlying phenomenon (Leech, Onwuegbuzie; 2008). Moreover, although mixed methods were used, a stronger emphasis was put on using qualitative methods, with a minor quantitative aspect. As Aspers & Corte (2019) explain, qualitative research involves collecting and analysing non-numerical data (e.g., text, video, or audio) to understand concepts, opinions, or experiences. Such an approach can be used to gather in-depth insights into a problem or generate new ideas for future research. The data collected and analysed is primarily non-quantitative in character, consisting of textual materials such as interview transcripts, fieldnotes and documents, and/or visual materials that document human experiences about other/or one's self in social action (such as artifacts, photographs, video

recordings, and Internet sites), (Saldana, 2011). On the other hand, quantitative research involves collecting and analysing numerical data for the purpose of statistical analysis.

Initially, for this doctoral research, activities based on qualitative data were undertaken in order to learn more about the problem from experts. The initial qualitative activities, such as the semi-structured interviews and visits to case study retailers, helped develop a clearer understanding of the problem. When the problem was defined, some areas remained under speculation. Therefore, at that critical stage, the Delphi method was introduced, which included quantitative methods to assess the consensus between experts. Therefore, even though the study uses mixed methods, it is a qualitatively-driven mixed methods research. This, according to Hesse-Beiber (2010) is the type of mixed research in which one relies on a qualitative view of the research process, all the while recognising that the addition of quantitative data and approaches are likely to benefit most research projects.

Interpretivism was seen as the most appropriate epistemological approach to the subject. Interpretivism is a broad approach that acknowledges that when we engage in data collection and analysis we construct knowledge rather than passively take in information that exists in the world. Compared to positivism, in which evidence is often taken as a given, interpretivism sees each piece of evidence as having social roots. Therefore in interpretivism, the emphasis is to offer meanings that people attach to what is being empirically observed.

Additionally, when taking an interpretivist approach, researchers tend to gain a deeper understanding of the phenomenon and its complexity in its unique context instead of trying to generalise the base of understanding for a whole population (Creswell, 2007). When taking an interpretivist stance, brands and culture are seen as socially-constructed through culture and language, and can have multiple meanings, interpretations and realities. Therefore, grounded in an interpretivist research philosophy, the thesis is largely based on talking to design and branding professionals and practitioners who work within brands and focuses on their narratives, stories, perceptions and interpretations. The new understandings that their views provide are seen as a valid and legitimate. This research, with its focus on the cultural

dimensions of spatial experience design, is then well suited to interpretivism, with its ontological stance of subjectivity over objectivity (Mack, 2010).

Interpretivism has many advantages including enabling the researcher to be active to changes that occur and allows for complexity and contextual factoring. Williams (2000) suggests that generalisation is inevitable, desirable and possible. However, interpretivism must employ a special kind of generalisation. Braun and Clarke (2019) talk about the final analysis in interpretivist data, the results of prolonged data submersion, and reflection, and something that is active rather than generative. Meaning does not passively emerge out of data, rather they develop a systematic approach, called thematic analysis (TA), that offers advantage and flexibility to deal with interpretive data. Thematic analysis offered an approach that required reflexivity, theoretical knowledge and transparency (TA will be explained in more detail in Section 3.7).

3.2. Researcher Positionality

The term positionality both describes an individual's world view and the position they adopt about a research task and its social and political context (Foote & Bartell 2011, Savin-Baden & Major, 2013 and Rowe, 2014). As Foote and Bartell (2011, p.46) identify the positionality that the researchers bring to their work, and the personal experiences through which positionality is shaped, may influence what researchers may bring to research encounters, their choice of processes, and their interpretation of outcomes. Therefore, as in all research, it is helpful to understand our positionality and, therefore, our lens on the data. As Scharp and Thomas (2019) argue, scholars engaged in critical social science research should assess how their own positions and experiences might contribute to their interpretations of people's experiences.

Based on the previous literature, it is clearly understood that one of the epistemological assumptions of the social constructionist/interpretivist paradigm is that there is not one reality but many realities "that can be articulated based on the values, standpoints, and positions of the author" (Daly, 2007 , p. 33). Thus, I offer these findings as only one possible interpretation of these individuals' experiences based on my standpoint as an Arab (Bahraini specifically),

bilingual, female, with an interior design background, working in academia and living in between both Bahrain and the U.K. (which I revealed either directly or indirectly to everyone I interviewed).

My geographic location being in between Bahrain and the U.K. from 2009 until the completion of the PhD really influenced how I viewed the topic of localisation. I was able to identify slight differences in the spatial experience design in different locations because I was exposed to several, as opposed to being in one location and not being able to compare or identify the differences. Being in a location for a longer span of time as well gives me a deeper understanding of the culture rather than a surface understanding as I am integrated into it and therefore, even slight differences that would not have been obvious to someone not living in the country, would be noticeable to me.

Being Arab living in the U.K. meant that the majority of the people recruited are from these two contexts, but the recruitment process also enabled the recruitment of people from multi-cultural background and different geographic locations. Both the geographic locations are multi-cultural and diverse. Britain in general is a culturally diverse nations, and Newcastle specifically even has a plan published by the Newcastle City Council in 2015 stating how they are in favour of cultural diversity and how they plan to maintain the city a culturally diverse, and inclusive community (Newcastle City Council, 2016). While Bahrain has always been an international maritime trade and multicultural hub. UNESCO World Heritage Convention stated that there is no other majority-Muslim city that presents the same diversity of religions and cultures in a limited space that peacefully coexist and where each group can express their traditions publicly without disturbances (UNESCO, 2022). This means that I am used to dealing with people from different cultural backgrounds, therefore I offer the analysis from a multi-cultural perspective. This also created more of an understanding of the type of questions and conversational strategies to make people more comfortable in sharing. Being bi-lingual also enabled some participants to switch between languages if necessary to better explain what they are trying to say especially in the context of this topic.

Being an Arab also meant personal experiences related to the topic enabled me to have a previous perspective on the topic of cultural differences. Especially since the oil boom meant the development of modern buildings in Bahrain with no real identity. Therefore, the perspective I offer is that which works into findings way of representing our individuality and celebrating our differences while being aware of some global factors that come into play.

Furthermore, my educational background as an interior designer also enabled me to be able to see details from an interior designer's perspective, and understand jargon related to the topic when interviewing as well as have a general idea of the design process before the interviews and when analysing the findings. This enabled me to bring in certain vocabulary when speaking to interviewees that had a design background to elevate the conversation.

My position as an educator also influenced how the interviews as well as workshops were conducted. The power dynamics differed from one study to another. In the final study which is the series of workshops that was conducted in Ahlia University with interior design students I was the expert in the field in comparison to the students. While in the interviews the professionals in practice were the experts that I was trying to learn from.

Therefore, the findings are offered as only one possible interpretation of these individuals' experiences based on my standpoint as an Arab (Bahraini specifically), bilingual, female, with an interior design background, working in academia and living in between both Bahrain and the U.K.

3.3. Research Overview

This section explains the overall methodology and how each phase led to the other in relation to the research aims. This thesis has two main aims. The first aim of this research is to explore how brand managers and experience designers of global brands teams work towards localising their spatial experiences to different geographical contexts and settings. The second aim is to develop creative toolkits that can be used when addressing the representatives of global brands in different geographical contexts and settings within spatial design. The outcome will be validated by using a case study in Bahrain, where the suggested creative toolkits will be tested.

In order to meet these aims, the methodology was split into three phases: secondary research, primary data collection and validation (depicted in Figure 6). In the first phase, the secondary research phase, a literature review was conducted (Chapter 2) to identify gaps in knowledge within existing research, explain the context and the background of the investigation and to guide the collection of new data. In phase two, the primary data collection, preliminary interviews, case studies, Delphi surveys and the development of a toolkit based on the findings was conducted. Preliminary interviews were conducted to better understand the nature of the teams working for global brands and how they practice adapting their spaces to geographic contexts by interviewing members of the global marketing, design and brand management teams that work in translating global brand experiences into local environments (explained in more detail in Section 2.3. and reported on in Chapter 4). The preliminary semi-structured interviews provided a starting point into understanding how global brands teams operate when translating global brands into different geographic settings and contexts. However, deeper engagement with specific examples of brands is needed to better understand how globally disbursed team members operate within one organisation and translate global brand identities in different ways around the world. Therefore, two case studies were used to understand in more detail how global brands translate their spaces into different geographic contexts (explained in more detail in Section 2.4. and reported on in Chapter 5). A Delphi survey was subsequently conducted on information from all of the previous findings to add a further layer of validation (explained further in Section 2.5. and reported on in Chapter 6).

The toolkits phase was the third phase. The toolkits were developed based on the findings of the data analysis from the second stage and the expressed needs of participants. The toolkits were then evaluated with interior design students in a series of workshops based in Bahrain (explained in more detail in Section 3.8. and reported on in Chapter 7).

The research was iterative in nature as the process involved repeated trial-and-error style cycles, where I adjusted each cycle according to what they learned in the previous iteration. One reason to use the iterative process is for its flexibility. A major benefit of the model is its ability to allow users to revise and refine the processes quickly.

One reason to use the iterative process is for its flexibility. A major benefit of the model is its ability to allow users to revise and refine their processes quickly. This was especially beneficial as the toolkit was still in the planning phase of development and did not yet have a completed model available. Every iteration improves on the previous step, so it was easy to understand what phase in the development I was in.

The iterative process is also efficient some alternative approaches, like the waterfall approach, rely on established steps to arrive at a desired result. When using these processes, external or internal changes can sometimes disrupt the ability to implement improvements quickly and stay on track for timelines and specific requirements. In contrast, the iterative process allows for deviations in the plan and for large changes mid-way through. This helped stay on target and quickly recover the changes were implemented.

The iterative approach allowed me to improve their existing process consistently and reliably. Each iteration cycle allowed us to evaluate areas for improvement and to implement the lessons they learned. That means every new iteration is typically better than the last. By improving the process consistently, we created a carefully designed processes.



Figure 11: Research methods in the order they were conducted. Source: Author.

Phase 2: Primary Data Collection

3.4. Preliminary Interviews

Preliminary interviews aimed to interview members of the global marketing, design and brand management teams that work in translating global brand experiences to particular geographic contexts. As noted in Chapter 2, experience design is a holistic view of spaces. In order to understand how these holistic spaces are currently developed it was seen as necessary to talk to brand managers and experts, interior designers, and marketing specialists working in-house and those that were outsourced. The intention behind these interviews was to better understand the nature of the teams working for global brands and how they practice adapting customer-facing spaces into specific geographic contexts.

The literature review established that global brands engage with different markets, and typically take a holistic view of the brand experience in which the physical store is one of the aspects. Many global brands use globally distributed teams in order to manage the complexity that comes with such activities. This need fosters the formation of multidisciplinary teams specialised in experience design. The specialisations that were seen as necessary within the globally distributed teams with regards to spatial experience design included brand managers, designers from different disciplines and both in-house and outsourced marketing specialists. Therefore, the interviews were conducted with participants related to those three areas and examined the experiences of professionals working for or with global brands in globally distributed teams to examine how they confront issues related to arranging a global design team and how that affects localised spatial experiences. Moreover, the literature confirms that holistic experiences need organisational work across all functional boundaries, as Kalback (2016) suggests, and they have to do whatever it takes to ensure their visitors have a great experience.

In order to identify participants who met the sampling criteria, a search of public professional networks was conducted. Contacting the participants and retrieving information about the possible participants was done through their professional network using widely available public information, so as to not breach any of their privacy rights. Participants were from the UK and abroad because, as noted, global brands' design teams are globally distributed.

The first recruitment approach was done by means of distributing messages via professional networks (i.e. LinkedIn). These initial messages briefly introduced the nature of the research, who was conducting it, and how much time would be involved in participation. Interested participants were asked to respond directly to the researcher via email or replying to the message. This was seen as appropriate because it was the easiest way to identify the potential participants, their professional backgrounds, and to assess whether they met the set criteria. It was also an approach that enabled reaching out to people internationally. Participants were also recruited using snowball sampling, whereby existing participants referred other qualifying participants at the end of their interviews to recruit them.

Seven participants were interviewed for these preliminary interviews. The interviews were semi-structured in nature. The questions began with the general and went on to the specifics moving between the individual and the company. The first half of the interviews involved asking participants about their jobs and backgrounds. The aim of the first part of the interviews was to make them comfortable speaking with me and just having them explain a bit about what their work is like. The participants were then asked to describe the brand they worked for, and how they managed to develop that brand. The second half of the interviews moved onto discussing participants' current practices, including the teams and expertise they needed for key tasks, the methods they use, and describing their day-to-day activities such as managing and running routine work processes. They were also asked if they have any initial suggestions as to what they think practitioners would need to make the complexity of translating the global brand into geographic contexts and settings smoother. The interviews were conducted in person or via video conferencing (e.g. Skype) depending on participants' availabilities and their geographic proximity to the researcher.

These preliminary interviews helped explore more general questions I had prior to going more deeply into some of the identified themes in the case studies. They also provided an opportunity to test the methods chosen for recruiting participants. The preliminary interviews considerably helped inform a more advanced set of questions for the next stage, questions that directly targeted the aims of the study. Findings of the preliminary interviews are reported in Chapter 4.

3.5. Case Studies

Even though global brands have been widely studied in various literatures, there is a lack of literature linking how such brands are managed and the role that localisation and experience design plays within them. The preliminary semi-structured interviews provided a starting point into understanding how global brands' design, marketing and management teams operate when translating global brands into different geographic settings and contexts. However, deeper engagements with specific example brands were needed to understand in more detail how globally-distributed design, marketing and management team members operate within one organisation and translate global brand identities in different ways across the world. Therefore, a series of case studies were used to understand in more detail how global brand design marketing and management teams translate the stores into different geographic settings and contexts.

Yin (2014) defined case study research as a technique that explores an existing phenomenon in detail and within its real-world context. Flyvbjerg (2013) promotes the case study approach as a method for exploring a phenomenon, suggesting that it can deliver a precise comprehension of the phenomenon's causes and results, and an understanding of the qualities of the unique situation at hand, so as to encourage new theories and generate novel research questions.

This phase of the research used two cases, where attention is focused on the complex nature of the successful brand and to comprehend the methods used within global brand design, marketing and management teams in these specific conditions. The companies selected for this study were Starbucks and IKEA. A few possible global brands were outlined at the beginning, both with in-house and outsourced design, marketing and management teams. Professionals working within those global brands in marketing, design and brand management were contacted, however because of the nature of outsourced design teams and professionals working on several projects, it was unclear which outsourced professionals worked within global brands, and therefore they were harder to identify and contact. It was easier to identify in-house professionals working within global brands, making it possible to identify a larger number. Identifying a larger number meant the interaction between the different team

members and in some cases different departments throughout the organisation was possible to understand management practices.

The case studies started out with secondary research, to ensure that the researcher had an informed understanding of the brand. Secondary research showed that Starbucks and IKEA were identified within the list of possible global brands because both companies are considered valuable global brands with many stores around the world and a continuous presence at the top of global brand leader boards (e.g., Forbes, 2019; Interbrand, 2019; Financial Times, 2019).

It was also important that these brands have physical stores because the research looks into spatial experience design, which the literature revealed that global brands do looking into grey literature. Design and architecture catalogues available online were also examined, such as *'Archdaily'* and *'Dezeen'*, along with articles reporting on developments for these brands. These usually included images of different store and shop spaces, the names of architects or interior designers or firms that worked on the design, as well as written descriptions of those spaces. Each brand's official website was also examined for images of stores, the brands' mission and vision, and how this correlated with the way their brand was being translated into interiors. Therefore, keeping the secondary research findings in mind, studying these brands, and how they support brand development over different markets worldwide, offers a potentially promising starting point for understanding how a global brand can maintain good collaborations within organisations and successfully produce localised spatial experiences (this will be further expanded upon in Chapter 5).

However, even though both the brands chosen are suitable according to the criteria set, they do have some major differences. The case study brands – Starbucks and IKEA have differences based on their country of origin, brand and product offerings, and customer journey as well as expected time spent at the physical store and interaction with other touchpoints.

Country of origin (COO) is a well-researched global marketing topic. In mid-1997, Heslop, Papadopoulos, and Bourke (1998) estimated that there were over 300 COO-related studies. While more recently in 2005, Pharr estimated the COO literature had increased to well over 700 studies. However, even in Pharr's perspective and with the extensive research on the topic COO

remains a complex construct. In relation to the case studies Starbucks' country of origin is Seattle, Washington, United States. While IKEA originates from Älmhult, Sweden. Therefore, Starbucks is an American brand while IKEA is a European brand which affects how people perceive the brand and the qualities that the localisation will cover when taking inspiration from the country of origin as the literature reviewed in the literature review suggests. Even though they are from different countries they are both from Western developed countries relating to the literature on decolonizing design also discussed in the literature review. Therefore, this will affect aspects such as brand trust, as well as affects the economy that the brand contributes to.

In terms of brand and product offerings the case study brands also differ. Starbucks offers a range of products including mainly coffee, beverages, and merchandise such as coffee equipment, mugs and accessories, music, books, gifts and fresh food. The physical space also sometimes offers "a gathering place for meeting friends and family" (Starbucks Stories, 2019). Therefore, the time expected to be spent in the physical store varies but it can be as little as five to ten minutes if they are grabbing a product, beverage and leaving. This is especially true if the space is a drive through or a booth and does not offer seating. Therefore, Starbucks a typical Starbucks measures around 2,000 square meters, and the new smaller-format locations will span just 400. The format, dubbed Starbucks Pickup, caters to consumers who order ahead via the Starbucks app and pick up in-store.

While IKEA offers approximately 9500 products, a significant part of which comprises ready-to-assemble furniture pieces. IKEA stores consist of box-like buildings. They offer their clients restaurant-café, decorated themed rooms, playground for the children, house equipment area, self-service stock as well as a shop with Swedish snacks. Specifically, IKEA stores consist of two floors. In the upper floor the furniture is exhibited, starting by five room settings and the restaurant is situated, while the ground floor comprises the house equipment, the stock, the Swedish shop and the playground, as well as the parking lot.

Starbucks stores are usually positioned inside cities centres while IKEA stores are usually positioned outside cities' centres. Therefore, the frequency of visits expected in the Starbucks

store are more often than the IKEA store. Currently the smallest standard stores that are built are 32,000 square meters and the largest are 45,000 square meters (Jonsson & Foss, 2011).

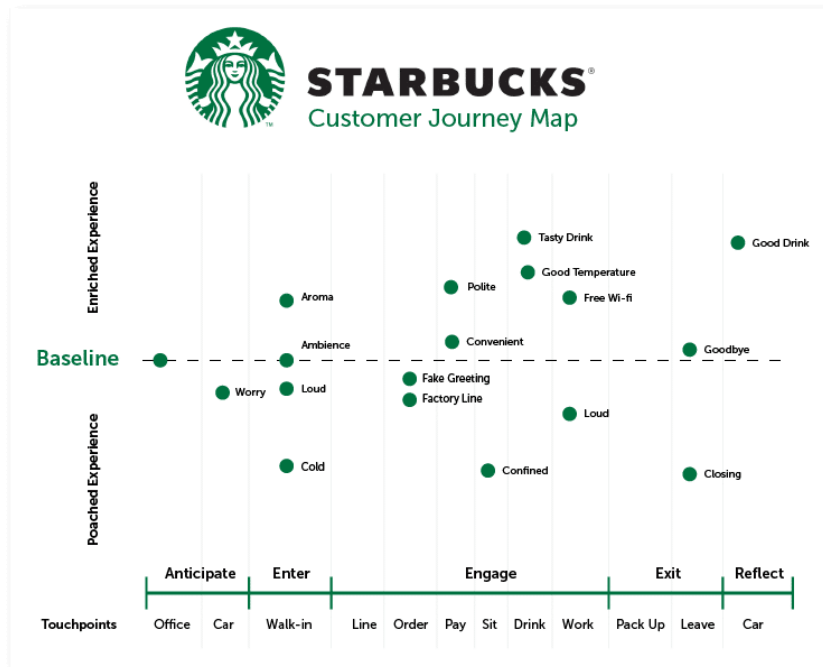


Figure 12: Starbucks Customer Journey. Source: The Restaurant Customer Journey.

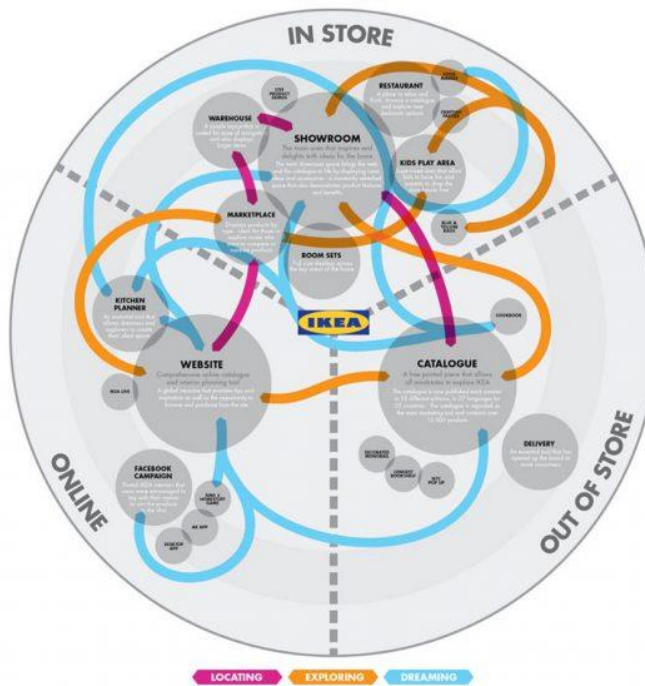


Figure 23: IKEA Customer Journey. Source: Medium.

The journey diagram above illustrate how the Starbucks brand journey is linear while the IKEA journey is interconnected.

The following diagram illustrated the similarities and differences between the two selected case studies.

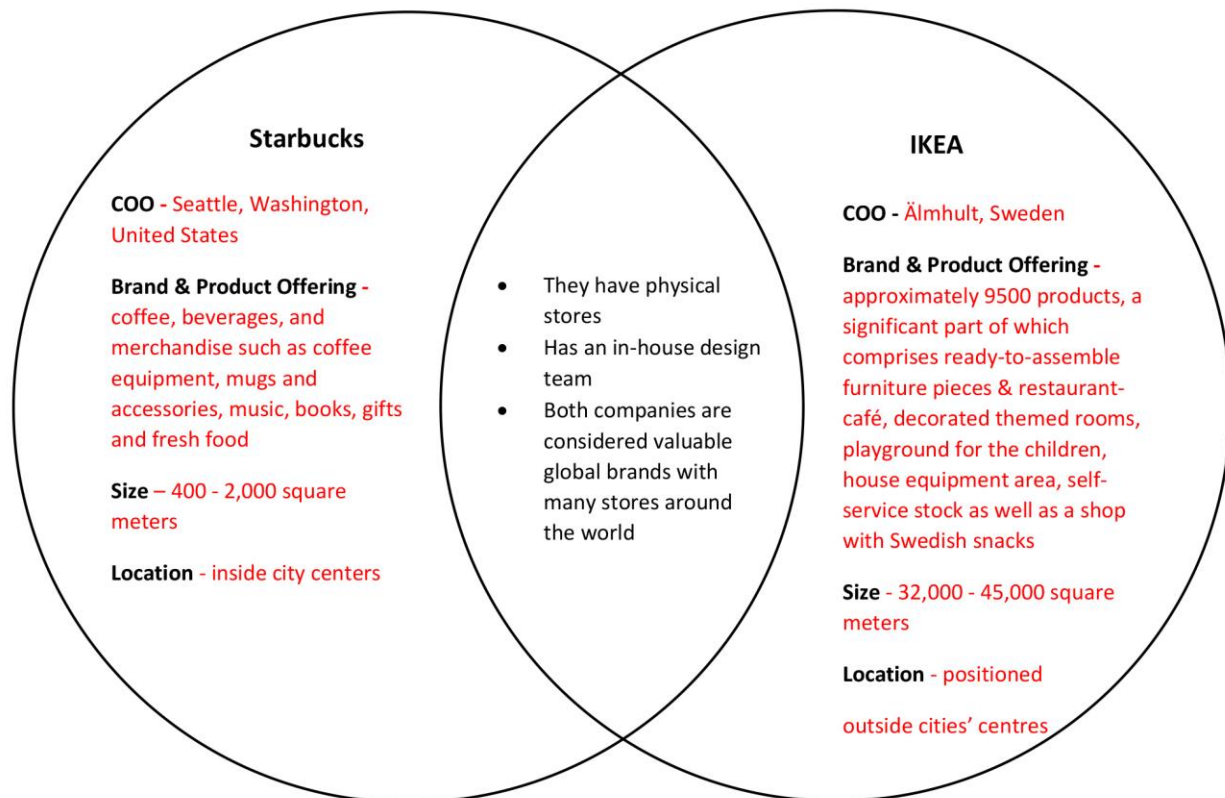


Figure 14: Ven Diagram illustrating the differences and similarities between the two case study brands. Source: Author.

When it was determined that these two case studies were suitable, information about these two brands also included visiting stores, shops and branded spaces, experiencing these spaces and taking photographs. Using observation, the stores were visited to observe the physical spaces that the brands had developed and localised aspects within those spatial experiences were documented for the research. Martin & Hanington (2012) describe observation as a fundamental research skill, which requires looking into and recording a phenomena – including people, artifacts, environments, events behaviours, and interactions. They explain casual observation, as the researcher observing with a casual mind, and departures from the plan were allowed as a response to unexpected events during observation.

In terms of observation both stores were visited in both geographic locations that I was based in which are Newcastle and Bahrain. Starbucks archives on their websites had a big variety of documented stores around the world, with information about the design available. This information in their archives, together with physically visiting the stores in Newcastle and Bahrain offered a starting point into beginning to understand what Starbucks changes in their spatial experiences around the world. In terms of IKEA, there was no archive with stores designs and their differences available publicly, and therefore, understanding the differences between the stores before formulating the questions and interviewing the participants from IKEA offered a much more prominent role in the case studies as opposed to Starbucks. Photographs documented during the observations of the IKEA store in Bahrain are displayed and discussed further in Chapter 5, section 5.5.

The employees on the design, marketing and management teams at both Starbucks and IKEA, are in-house. These in-house members were contacted to determine who was interested in taking part in the study. Nine professionals were interviewed at this stage including three store designers from Starbucks, one design manager from Starbucks, and a marketing manager, marketing specialist, interior design lead, interior designer, and architect/interior designer at IKEA (findings reported on in Chapter 5).

3.6. Delphi Surveys

As mentioned above, only in-house professionals in terms of teams were available for the case study interviews. Therefore, the aim of the validation surveys was to make sure that professionals within global brands with different organisational structures agreed with the findings from Starbucks and IKEA, as well as other areas of speculation that were not answered in the case studies. Therefore, the Delphi surveys were conducted to add another layer of validation to the knowledge gained from previous findings.

The Delphi method was chosen to validate such information and reach consensus. A Delphi study is a virtual panel of experts gathered to reach an answer to a complex question. Thus, a Delphi study could be considered a type of group decision technique. Landeta (2006) explains the Delphi method as a group technique aiming to obtain a reliable consensus of opinion in a

group of expert participants by means of a series of intensive questionnaires with controlled opinion feedback. Okoli & Pawlowski (2004) also noted that the Delphi method may be characterised as a method for structuring a group communication process so that the process is effective in allowing a group of individuals, as a whole, to deal with a complex problem.

The Delphi method has proven itself a popular tool, however, there are not many studies that have adopted a systematic approach to conducting a Delphi study. In their article "*The Delphi Method As a Research Tool: an Example, Design Considerations and Applications*", Okoli & Pawlowski (2004) provide rigorous guidelines for the process of selecting appropriate experts for the study and list detailed principles for making design choices during the process to ensure a valid study. Therefore, this research approached the Delphi survey based on their clear criteria.

In their work, Okoli & Pawlowski (2004) developed and described evaluation criteria for the use of the Delphi method, which considers the summary of the procedure, the representativeness of sample, the sample size for statistical power and significance of findings, anonymity, and finally the development of a knowledge resource nomination worksheet (KRNW). The KRNW is a sampling procedure used to systematise the procedure for distinguishing specialists (Okoli and Pawlowski, 2004). Figure 8 gives a synopsis of the procedure used to choose members of the panel board in this investigation.

Okoli & Pawlowski (2004) explain that all the questionnaire design issues of a regular survey also apply to a Delphi study. Surveys are an efficient tool to collect data in a short amount of time (Hanington and Martin 2012), with little cost and with some versatility in terms of the types of information that can be collected. Okoli & Pawlowski further explain that the difference between a regular survey and a Delphi survey is that after the researchers design the questionnaire, they select an appropriate group of experts who are qualified to answer the questions. The researchers then administer the survey and analyse the responses. Next, they design another survey based on the responses to the first one and re-administer it, asking respondents to revise their original responses and/or answer other questions based on group

feedback from the first survey. The researchers repeat this process until the respondents reach a satisfactory degree of consensus, which the regular surveys do not necessarily have to do.

The Delphi group size does not depend on statistical power, but rather on group dynamics, to arrive at expert consensus. Brockhoff (1975) and Boje and Murnihjam (1982) have looked into the effect of the quantity of panellists on the accuracy and viability of the technique. Neither of the studies found a significant relationship between the quantity of panel individuals and viability. An outline in Rowe and Wright (1999) showed that in peer-reviewed examinations, the size of a Delphi panel has extended somewhere into the range of eight to sixteen specialists, and at least eight is recommended. Okoli & Pawlowski (2004) suggest ten to eighteen experts on a Delphi panel. Hallowell and Gambatese (2010) suggest that the particular number of panellists ought to be directed by the characteristics of the investigation, for example, the quantity of accessible specialists, the ideal geographic portrayal, and the capacity of the facilitator. The chosen number of panel members ought to likewise consider that a few specialists may choose to drop out of the investigation due to changing responsibilities or lack of engagement. As such, an adequate number of specialists should to be chosen at the outset of the procedure to guarantee a certified panel towards the end of the examination, with the expectation that some will not complete each round. Therefore, two panels (in-house and outsourced) were planned, aiming to recruit a minimum of eight and a maximum of eighteen specialists. The final number included fifteen participants in the in-house panel and eleven participants in the outsourced panel keeping a good enough number so that if people do not drop out the number does not go below the suggested minimum of eight.

There are two reasons for having multiple rounds of surveying in a Delphi, the first being that the fundamental aim of a Delphi survey is to arrive at consensus by decreasing variance in responses. The second reason is to improve accuracy. Both of these goals are accomplished using controlled input and cycling the survey. Hallowel and Gamabtese (2010) observe that it is accepted in much of the Delphi literature that merging viewpoints to come up with a collective opinion with precision are improved with each round of questioning. Be that as it may, the literature does not provide direction as to a worthy number of cycles. An outline of assessed Delphi surveys shows that the quantity of rounds varied from two to six (Dalkey et al. 1970;

Gupta and Clarke 1996; Pill 1971). Most of these investigations discovered satisfactory answers after three cycles or less. Dalkey et al. (1970) even proposed that the Delphi results are generally exact after cycle two and become less precise following extra adjustments. Therefore, keeping in mind that the Delphi surveys build on existing findings, having two rounds was seen as sufficient for this research.

Respondents were always anonymous to each other, but never anonymous to the researcher, in line with Okoli & Pawlowki (2004). This gives the researcher more opportunity to follow up

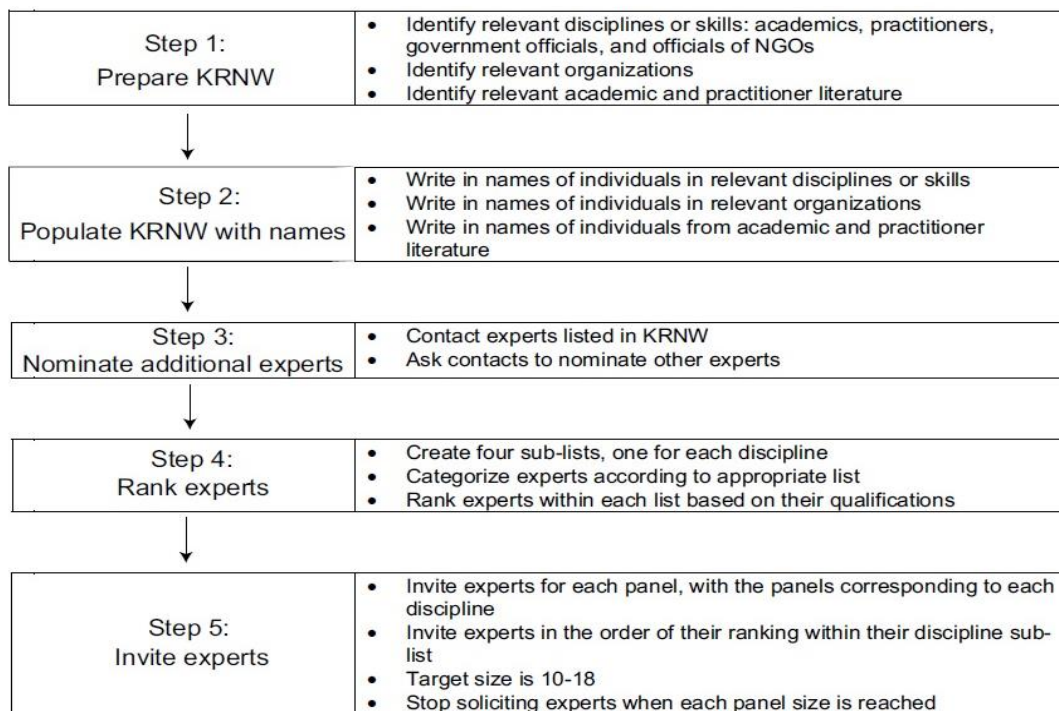


Figure 15: KRNW procedure. Source: Okoli & Pawlowski (2004).

with them directly for clarification. Therefore, the first question in the survey was for the respondent to state their title and organisation; however, this information was not to be published or disclosed to the rest of the panellists. That information was acquired so that the researcher could keep track of the respondents' answers and identify whether the participant was part of the in-house or outsourced panel.

As outlined in Figure 15, Step 1 is to prepare the survey by identifying the relevant areas of expertise, profiles, and associated organisation representing the expert populations under

scrutiny in the survey. In this case, it was to identify two broad areas of needed expertise, which are in-house vs outsourced global brand team members. It was decided to ensure that experts were well represented in both of these major design management models based on the findings of the preliminary interviews. Relevant organisations identified included Nike, Adidas, Four Seasons, Dior, Chanel as well as third party companies like Al-Tayer, Chalhoub and Al-Shaya (an overview of why these brands were chosen and identifying relevant literature is provided in Chapter 6). Furthermore, individuals from these companies were identified (Step 2 in the KRNW procedure), retrieved via the publicly available professional networks (e.g. LinkedIn) through which they were contacted. As with previous data collection activities, these initial messages briefly introduced the nature of the research, who was conducting it, and how much time would be involved in participating. Interested participants were asked to respond directly to the researcher via email or by replying to the message. Participants were also recruited using snowball sampling until data saturation was reached (Step 3 in the KRNW procedure). The interested participants were ranked. At this step, we compared the qualifications of those on the large list of experts and ranked them in priority for invitation to the study (Step 4 in the KRNW procedure). Furthermore, the participants were invited based on their ranking to fill out the survey (Step 5 in the KRNW).

The nature of the questions in the first part of the survey was open-ended, encouraging the panel members to answer freely and in detail. This is because the first part of the survey needs to enable the same level of interaction offered to the case study team members in the interviews. Therefore, the perspectives of the panel members had to be fully taken into consideration in order for them to be compared and contrasted with previous findings.

The second part of the survey takes into consideration both the case study findings as well as the first part of the Delphi survey findings. Any contradictions, or confusion would be reformulated as a question in order to discern whether the panel members could reach consensus on the matter. The second part of the survey's questions included close-ended questions such as rating the degree to which panel members agreed with the statement (ranging from strongly agree, somewhat agree, neutral, disagree or strong disagrees) or asking multiple choice questions (findings reported on in Chapter 6).

3.7. Qualitative Data Analysis

Thematic analysis was conducted to analyse the qualitative data resulting from the interviews both from the preliminary, case study phases as well as the qualitative data derived from the Delphi method. Thematic analysis is a method for recognising, interpreting, breaking down and constructing patterns (themes) within the data. Thematic analysis arranges and portrays data sets in detail (Boyatzis, 1998). Other than being an accessible method, thematic analysis was also chosen because of its flexibility – not simply theoretical flexibility, but flexibility in terms of the research question, sample size and constitution, the data collection method, and approaches to meaning generation. Thematic analysis can serve to identify patterns within and across data in relation to participants' lived experiences, views, perspectives, behaviour and practices; 'experiential' research seeking to understand what participants' think, feel, and do. (Clarke & Braun, 2017).

Braun and Clarke (2017) outline six stages of thematic analysis upon which the analysis was based. The first step they outline is familiarising oneself with one's data such as transcribing the data, reading and re-reading the data and noting down initial ideas, this was done by transcribing audio interviews into written form. The second step was generating initial codes, colour-coding parts of the transcripts by highlighting them. The third step that Braun and Clarke discuss is searching for themes, this was done by writing the suggested theme name next to each highlighted part within the transcripts. The themes were then reviewed, as suggested. Stage four starts when one has conceived a set of candidate topics, and it includes the refinement of those topics. During this stage, it will become clear that a few topics are not so much themes (e.g., in the event that there is insufficient information to support them, or the information is excessively different), while others might collapse into one another (two clearly-isolated subjects may shape one topic). Different topics may need to be separated into isolated themes.

For every individual theme, Braun and Clarke suggest that the researcher conduct and compose a detailed analysis. Furthermore, they must recognise the 'story' that each theme advises, it is imperative to consider how it fits into the more extensive general 'story' that the researcher is telling about her data, in connection to the exploration question or questions, to guarantee

that there is overlap between themes. Therefore it was fundamental to think about the themes themselves, and how each topic corresponds to the other. In terms of the refinement, it was important to distinguish whether a theme contained any sub-topics.

Stage 6 started when the researcher had multiple themes completely worked-out, and included the final analysis and review of the report. The writing of the thematic analysis is to recount the completed story of the information in a manner that persuades the reader of the validity and legitimacy of the examination. It was vital that the investigation (its review, including extracts from the transcripts) gave a coherent, and interesting record of the story across topics. The review, as Braun and Clarke suggest, must give adequate proof of the themes within the data, enough information must be extracted to show the pervasiveness of the theme. The quotes that were selected were especially striking examples, or concentrates, which captured the essence of what was being illustrated, without any unnecessary complexity.

Marketing Manager at IKEA, Gateshead (IK1)		
Time	Speaker	Audio
00:00	Researcher	Okay I will just start out with talking about your role and what you do. So could you tell me what your work involves?
00:08	Participant 01	Okay so, I'm the marketing manager. The local marketing manager. So the structure the way it works in IKEA is we have a UK and Ireland manager who oversees the entire organization in the UK and Ireland. So within obviously you would have a support marketing manager, so she would be the go to person so if I was looking for something, if I need some input I can go to her, but then every store in our market, we have an either marketing manager or a marketing leader depending on what the structure looks like. So, if it is a local marketing leader then they report kind of report into a CMA marketing manager which is the same for a marketing area. When you are in CMA, which is a priority marketing manager social and I report it to the store manager but then also report it to a service office. So the routine is quite complex but the reason being that the local marketing manager can look at the local market and focus on the local market, so in terms of focusing on a perspective, the purpose of the service office is to take a generic brand awareness and a generic message of identity of the brand but I would then work on a very local aspect to understand the local consumer, you know if you are thinking of the profile of the local consumer and go for that and then bring it into the store, so that is what I would do. Then the local manager can divide into several things so we look at market intelligence, we look at IKEA family which is kind of your loyalty cup, I would look at external communication and then I would manage the team and then of course I would work in terms of the store because I sit on the management team so operationally I would support the store, so it is quite a diverse role, I would also take PR, I would also take any of the other elements related to the store, even though I would not be the total owner of social media I would take anything related to it, because any local social wise I would be the pointer for and I would try to coordinate so it is quite a diverse role, in terms of like, yeah.
02:30	Researcher	What does a typical day or week look like in your role?
02:34	Participant 01	Oh, wow, never is the same so, if you think of a Monday, which is why I said Monday is the worst day for me, in terms of, we have a commercial meeting in the morning, so that is all of our commercial partners, not just IKEA you would have the sales manager, you would have the logistics manager, so IKEA food partners, there are the commercial meeting, the thing what my purpose is to feed into that commercially and to give it the direction, because obviously they know where they are going but I navigate them, so it is all strategy and the things help ultimately say this is what we are going into, that this is the bit of my role from a marketing intelligence perspective, so this is what the market is doing, then obviously to global, and this is the national strategy and this is where the global store stands that is where we want to go and this is why

Monday: managers meeting

Interior Design Lead at IKEA, Bahrain (IK2)		
Time	Speaker	Audio
1:50	Researcher	I'd like to start by talking to you about your role and what you do: Could you tell me what your work involves?
1:57	IK2	So I am the interior design lead in IKEA and then basically I am in charge of the showroom and my team. So we are involved in all the room sets and the inspirations in the showroom and creating them and updating them with every collection that comes and every new items that come, any old items that are going out of the range we kind of remove it and find new solutions, and for us the room sets are solutions and not just inspiration. We don't just create something because we want to, we create things that solve commercial needs. So we always say we basically sell ideas so we have to always think of the customer need but don't think of, so that is the idea of the area we are in charge of and what we do.
2:50	Researcher	What does a typical day or week in your role look like?
2:54	IK2	So usually we have a few hours of maintenance which is kind of to make sure the store opens and everything looks new to the customer. We always have to have the store looking fresh and clean on a daily basis and then other than that we look into the next collections, we get them weeks in advance and we have to plan for them also in advance. We have to plan for the things that are coming and which room can fit which new collection or design, which solution. In IKEA we always have to think about who the family is. So each room has kind of a concept and a story, who is in that room, what are they creating, price level for the room, is it for a couple, is it for a family, and all of that goes back to the market. The market of predominantly male, we are not going to have predominantly couple family rooms, so it plays a lot on that.
4:00	Researcher	Part of my research is really interested in how brand and experience design activities are coordinated and organized in companies like IKEA. Could you tell me what your roles and responsibilities are in the context of a wider brand team?
4:12	IK2	Yeah so the interior design team or in general the interior design and communication team, we fall under two categories, interior design and visual merchandising. So the interior design is basically the how, so we have something called the commercial team and it is basically the idea of trying to link between these functions, so we have the commercial team, the interior design team, the visual merchandising team, and then we have the marketing team, so we are in charge of finding solutions of how to display things in the store, so we have to think about the customer, usability and interior solutions, so that the team has to be able to work together.
5:01	Researcher	And how do you relate to the other teams?
5:04	IK2	We work very strongly together. We always have to think of what they need and how to portray that, because with other functions they mainly want to sell their stuff, so they want to sell their stuff. They make sure we are in front and then they don't realize okay this is a mile and it is in

1

Interior Designer at IKEA, Bahrain (IK4)		
Time	Speaker	Audio
02:07	Researcher	I'd like to start by talking to you about your role and what you do: Could you tell me what your work involves?
02:13	IK4	Okay so I am an interior designer at IKEA and I am in charge of creating displays in the showroom so the room setting usually the difference between an interior designer and a visual merchandiser is that a visual merchandiser does displays in what we call compact for example all of the beds or all the range of the tables but right next to it, whereas your job is to use the compact and the room setting.
02:51	Researcher	What does a typical day or week in your role look like?
02:55	IK4	It is usually all about maintenance, maintaining the room setting, maintaining them, making sure when the customer walks in everything is all right and whenever goes out of stock whatever it is they are in charge of finding a replacement for it.
03:19	Researcher	Part of my research is really interested in how brand and experience design activities are coordinated and organized in companies like IKEA. Could you tell me what your roles and responsibilities are in the context of a wider brand team?
03:30	IK4	The team is interior designers, sales and logistic teams. So logistics team is in charge of product shipments, making the orders of the next quantity, tracking all of that stuff, and making sure we have space in our warehouse for them. Our sales team they track how many pieces per item sells, is it a top seller, is it highlighted enough, how much profit does this bring us, all of these things. We have to be in line everyone, we have a room setting but it has this bed the bed is about to get out stock and they are not bringing it until two months from now, logistics has to align it with sales, sales has to align it with us and we need to change the bed to avoid customer frustration. We don't want the customer to come in see the bed and like it but then we don't have stock. So all of that we have to know before it has to be perfect communication to avoid all of that from happening.
05:13	Researcher	Is it possible to describe a typical project structure of a team?
05:22	IK4	I would say logistics, sales and interior designer. So one of my areas is the children area, so I have my sales team and the sales team has their leader, so I'm usually in contact with the leader and our logistics partner. So it is three partners in each area.
05:50	Researcher	My research is very much about how brand and companies manage their global identity and brand when operating in very different geographical and cultural locations. Is this an issue that you feel affects branding, marketing and retail spaces for IKEA?
06:04	IK4	Yes, definitely. So IKEA is Scandinavian it is a Swedish brand and Bahrain market so it is a bit of a clash. Thankfully our market is

Architect/ Interior Designer at IKEA, Jordan (IK5)		
Time	Speaker	Audio
01:57	Researcher	I'd like to start by talking to you about your role and what you do: Could you tell me what your work involves?
02:04	IK5	Okay so I am an interior designer and I work in a department in IKEA, which is the IKEA business. So basically the IKEA business is it is to give you meet with other clients who have small projects for example a small apartment or a small flower shop that they want to decorate or they want to have a small business and we help them with the design for them we pick and deliver their products and some kind of different condition but we make things easier for them, for clients who projects because if they want to choose furniture for a place where people would come, maybe they are just a restaurant or a shop, so we try to understand their need and we try to get their space down as a whole in cooperation with IKEA I am the interior architect in the department.
03:35	Researcher	What does a typical day or week in your role look like?
03:37	IK5	So basically I meet with the clients, I try to understand the project, their needs, their vision and their style. Whether they like modern or traditional furniture. So this is the first meeting what they want, what they like and the functionality of the space and after that we take it to work in the store and try to introduce them to the products in general, and I think it might be more suitable for their project, so we take the tour and once we agree on the basic terms, I start on the design and the design process takes a week to 10 days for the drawings, we have drawings on software or sketches and so on and after that I will start showing them the drafts, the plan, the elevations and they start giving me their feedback of what they like and what they want to change, so I start giving them my opinion for what works better because as an expert there are always the parts that I know better so I try to give them good advice, then we agree on the final design products, I pass it on to my colleagues who are sales experts and they go on to creating the lists and the quotations and so on, so this is basically what I do.
05:15	Researcher	So everything you design is from IKEA?
05:19	IK5	Yes, all the furniture in IKEA I can suggest for the paint colors or the flooring that we don't sell in IKEA we can recommend things that already displayed in the showroom.
05:50	Researcher	Part of my research is really interested in how brand and experience design activities are coordinated and organized in companies like IKEA. Could you tell me what your roles and responsibilities are in the context of a wider brand team?
06:02	IK5	So in my small team the IKEA business team, we have the interior part and the sales part, so the connection between the two teams not only in

Figure 16: Case study interviews transcription text analysis, highlighting, colour coding, quotes depending on themes. Source: Author.

Panel: Outsourced

Q1
Sales & brand director at Bug Expert Lebanon

Q2
Mc Donalds, AMEX, Red Bull, Imperial Tobacco, Mars, Saudi Telecom, BATELCO, USG Boral, Al Rajhi Bank

Q3
The perfect structure would be divided into 2 teams of course, strategic & brand management and creative. Ideally a mix of different individuals from various cultural backgrounds, ensuring broader insights. The pillar of such a team would be a creative copywriter, with deep local insights, who is able to translate the global insights of a brand into an understandable and acceptable local language. The team leader job in this instance is to perfectly understand the brand at its global positioning and work with a strategic team to mold it into local insights.

Q4
From my experience, the most effective way is to go on the ground and get insights from asking around and monitoring behavior. Online research can be an eye opener on global, regional and local competitive activities and will definitely help in a more precise brand positioning in the intended market. A very effective technique that I have used while working with Red Bull was to create specific local competitions/events based on local insights and preferences while preserving the brand motto.

Q5
This is the biggest challenge a global brand will face, especially when entering to developing markets. It is imperative for such brands to work closely with "experienced" local teams in market development, branding, brand management and communication. A brand name can mean different things in different products, hence the need to do thorough market studies and cultural insights to find the best way of positioning and communicating with potential target audience.

Q6
I disagree on having a checklist or a tool that enables cross cultural communication. This is a recipe for disaster. A brand that cannot speak (words) to locals in their own language and culture will fail. Most countries have different ethnic groups living, each with his own culture, way of life and traditions. Talking to all of them in one language (visually or verbally) will be a huge mistake. A brand should use different communication styles, insights and language to approach different audiences.

- approaching different audiences differently

Panel: Outsourced

Q1
Brand Strategy Consultant at PicassoHouse Co

Q2
BNP Paribas Yokogawa Costa Coffee KFC

Q3
As a Brand Strategy Consultant, one of my main tasks is to help position or reposition brands to help achieve their goals. I work closely with my marketing and creative team, with the early stage of the project both teams will be focused on doing intensive research and analysis of the current market place. Where the creative team will be looking into the current and previous brand creatives, analysing them, listing their weaknesses, and how it can be improved, and comparing them to their competitors, and listing their strengths, and what makes each unique. The marketing team will be first looking into the market landscape, then start doing a brand reputation analysis for the brand, and it's 3 top competitors within the market place. Listing all the cons/pros of each, and what consumers perceptions, the target audience of each, their tone, and style. Then it's my job to agree with our client about the brand/ product goal, set target audience. Then we coordinate with both marketing and creative team, to work on a set of goals to be achieved, before developing the brand local tone, message, and creative in a way that ensures brand relevance and uniqueness to consumers.

Q4
We use a mixture of analysis tools like Soconnect, Google Analytics, Website heatmaps, and Hootsuite

Q5
Yes. One of the very challenging aspects is the local taste, preferences, and lifestyle. The question is how much do you know about the locals vs local market. It's a lot easier to know the current market landscape, but more difficult to know about the locals, which most time require a fields research, and tests. Then the challenge how much a brand is willing to be flexible to accommodate local preferences.

Q6
Being able to define a specific target audience with a specific geographical location to get feedback and analyse

target audience

Figure 17: Survey text analysis, highlighting, colour coding, dividing into themes. Source: Author.

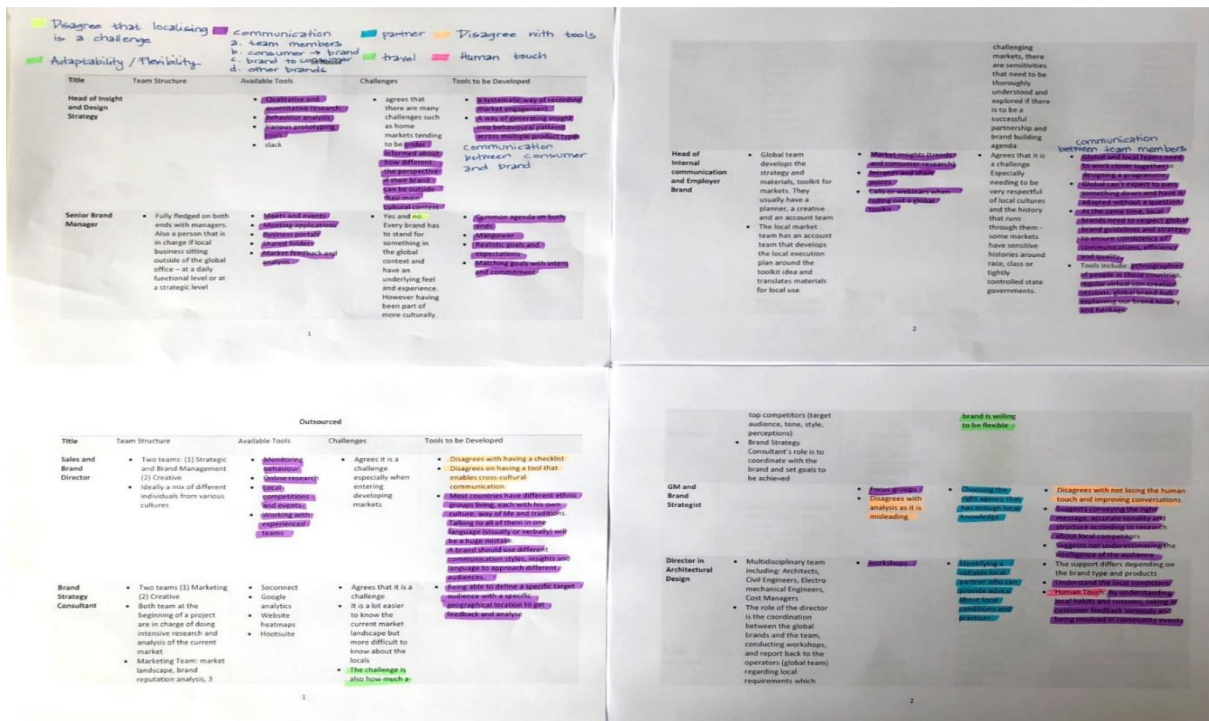


Figure 18: Breakdown of primary data phase participants. Source: Author.

As the vast majority of data from the Delphi study was qualitative, the analysis of responses from the Delphi survey also followed thematic analysis. Figure 8 outlines the first step in the analysis of the first part of the survey, whereby the participants' answers were highlighted based on what was seen as relevant, and notes were written to help in the initial categorisation of data.

Figure 9 shows how the participants' responses were analysed. First they were colour-coded, and then they were put into themes that encompassed the content of the colour code.

The quotes relating to a specific theme were later grouped under one heading, and the information was compared and contrasted with the case study and preliminary interview data to be further refined, and to discern whether any contradictions or patterns were generated from all of the data. The data was then used to create a series of statements on areas that were still under debate in order for specialists to rate to what extent they agreed with the statement (See Chapter 6 for more detail).

3.8. Quantitative Data Analysis

The panel within the Delphi surveys had to rate to what extent panellists agreed with the presented statements and had a chance to elaborate on their answer in the comments sections if they needed to. Scaling methods of agreement and importance were adapted from Rowe & Wright (2001) and have been previously used and described in the Delphi literature. Agreement scales were particularly relevant, as they gave participants an opportunity to independently rate each statement. To make comparisons between rounds and for feedback, percentage agreements were calculated for each level of the scale, to compensate for varying response rates.

Phase 3: Creative Toolkits

3.8. Developing and Testing the Creative Toolkits

Key insights from prior studies revealed the need for meaningful engagement with different geographic settings and contexts from a distance. This meaningful engagement should include a variety of ways to localise and a multisensory understanding from a distance of the geographic settings and contexts to be designed for.

The findings confirmed that localisation is being practice by global brands and is a valuable element of the design process. The preliminary interviews show that the skills and professional background that the multidisciplinary team should have, have sometimes been favoured over the cultural background and knowledge of specific geographical context and settings. This is because it is difficult to establish a balance when assigning members of the multidisciplinary teams that translates global brands into different geographical contexts and settings. Furthermore, the different teams that dealt with translating the spaces into geographical context and settings were usually doing so from a distance. The cultural background and knowledge can be made up for with reports from the headquarters about the geographic context and setting. However, some participants suggested that this information about the geographic context and setting should be more interactive and offer more multisensory knowledge (more details in Chapter 4).

Similar issues were seen in terms of localising spatial experience when conducting the case studies with global brands (Starbucks and IKEA). Localisation is being practiced but the teams wished it were embedded further into the team culture. In both cases design and localisation decisions were also usually made from a distance.

In the case of Starbucks, it was mentioned that in the cases where travel is possible for only one member of the design team, the person traveling would bring items back from the location to share with the team. If travel is not possible, the design team within Starbucks would read books or watch films to absorb the culture before designing, which proved again to be a challenge as the information needed is not always readily available, and also lacks multi-sensory understanding.

In terms of the interviews with IKEA team members, it was shown that they already used multi-sensory research by conducting home-visits to a variety of houses within a geographic context and setting to get their information. However, the participants spoke of a lack of structure in how these visits are constructed, and how important multi-sensory information is sourced from these visits.

Moreover, when conducting the case studies of Starbucks and IKEA, secondary research revealed that there is a variety of ways to localise spatial experience design. However, when interviewing members of the teams from both brands, the general process that the team members had to work with did not encourage the use of a variety of methods. For example, the use of collaborations with local artists was encouraged and embedded within the Starbucks process. Therefore, there was a heavy reliance on art as a way to localise. However, this is not the only way in which spaces can be localised, as secondary research revealed (more details in Chapter 5).

Furthermore, the Delphi survey also confirmed that global brands find value in localisation, with similar issues in terms of designing from a distance. The Delphi survey revealed that if there was a toolkit to be developed to help in the localisation of spatial experiences it needs to be affordable and easy to use. Another characteristic of the toolkit provided by the Delphi survey is that it needs to promote meaningful engagement with locales and context. Further to engaging meaningfully, most panellists agreed that in order to engage meaningfully requires an investigation of the multisensory in relation to the local context (more details in Chapter 6).

Therefore, the findings revealed the need for a way to meaningful engage with locals and understand the geographic context and setting from a distance. The findings also revealed that the general process needs to include more ways to localise, instead of heavily relying on the most convenient way because it has been embedded into the process.

Creative Toolkit 1: Spatial Localisation Prompts Cards

The first creative toolkit that was developed was to address the lack of a variety of ways to localise that is being practiced in some of the global brands' spatial experiences.

This phase of the research used several cases. The companies selected for this were McDonalds, Starbucks, Apple, Adidas and Aesop. A few possible global brands were outlined at the beginning by looking at leader boards. Global brand leader boards identified McDonalds, Starbucks, Apple and Adidas (all of the brands selected with the exception of Aesop) as constantly being at the top (Visual Capitalist, 2020; Interbrand, 2020; Ranking the Brands, 2020). They were also identified as brands with physical stores that localise and therefore could

be viable case studies for this study. Top design brands are listed on sources such as Dezeen, which identifies itself as “the world’s most influential architecture, interior and design magazine”. Dezeen’s hot list included all the brands already chosen from the global leader brands, but included Aesop (Dezeen, 2019). Upon researching the Aesop brand it was realised that the brand’s vision closely revolves around localisation and therefore was added to the list of cases that are going to be used to develop the list of methods.

The stores of the global brands around the world that were selected for the development of the cards were analysed, and this revealed ten ways in which a spatial experience design can be localised. Therefore, the final creative toolkit included cards with the different local aspects that the team can take inspiration from to localise. Each card also included an example of a successful brand’s store design that used that one of the ten methods to localise. The example is there to help relate the explanation of the method to how it can actually be applied successfully.

The final design included cards that can be used to direct localised research to potentially inspirational areas. Each card is laid out to include a prompt to research further, as well as an example from a global brand that has previously explored this area successfully within their spatial experiences (further details about the creative toolkits can be found in Chapter 7).

Creative Toolkit 2: Multi-sensory localisation package

The second creative toolkit was developed to address the need for meaningful information about a geographic context and setting, in a multi-sensory manner that could be accessed from a distance.

In a real world situation, designers, managers and marketing teams within brands, would use the creative toolkits. The team that is designing from a distance in geographic context A would receive a package for the geographic context and setting that the physical site is located in (geographical context B). This package is curated by a person that knows geographic context B well, so that the information is authentic.

Upon opening the package, the team in geographic context A would find the instructions page which includes how to use this creative tool as the first thing laying on top of the other

elements within the box. This instruction manual will first include a purpose statement about the intention of this creative toolkit, followed by the instructions.

The instructions will first guide the team towards viewing general information about context B (i.e. language, location and currency), then picking up the cards in four colour categories. The colour coded cards represent four general cultural categories including human, natural, place, and socio-cultural. Each card in a specific category represents a sub-category. For example the “human” category includes human elements such as how the people in that geographic context and setting interact, the demographics and the language(s).

The subcategories of the major categories (human, place, natural, socio-cultural) are represented by a visual icon, which matches the smaller package for that subcategory within the larger package. The card will direct the team in context A to the related smaller package and explain the contents or activity. Some activities will be for touching, some will be for smelling, some will be to help map out related areas in order to understand the users in context B, depending on what the local team that curated the package in context B sees appropriate. The creative toolkit also includes stationary such as markers, pins, and scissors to conduct some of the activities. Most activities will be pinned or placed next to the A0 map, as the instructions on the subcategory would suggest. The team in context A will end up with a map that illustrates in a sensory manner what the team in context B saw as vital information to know before designing for that context, guided by the categories.

The user designing the site in context A is free to choose any information they find inspirational as the creative toolkit is meant only to guide them. There are many sources of inspiration the user can draw from to localise the store, with more knowledge than that is available from a distance, especially for sensory aspects. The first creative toolkit of the localisation prompts can be used together with this creative multisensory toolkit at this stage. For example a few leaves and flowers from a certain natural context of a certain geographical location, found under the natural category, can be used as the inspiration to design using lines and colours from the surrounding context. Or they could indicate the surrounding nature encouraging certain activities, and therefore that becomes the inspiration to localise the spatial experience design.

Within one subcategory, the possibilities are many, especially when used together with the spatial localisation prompts.

The multisensory toolkit also included a large map of the geographic context on a foam board, enabling the user to pin the multisensory items on the map when possible, and lay them out on the table, in order to see a more holistic view of all the different cultural elements chosen and how they interrelate. This set up can then be used by the team throughout the process and serve as a starting point or grounding point for the cultural context.

Workshops

A series of workshops were designed where a team could use the toolkit in order to test its effectiveness. Even though in a real-world situation, the creative toolkits would be used by designers, managers and marketing teams within brands, budget and time constraints meant that they realistically would not be able to test the toolkits at the early stages of the tools developed, probably later on when the toolkits are more refined.

The specific contexts chosen were Newcastle and Bahrain, as having local contacts in both contexts is important, therefore I had to choose contexts in which I have previously lived. Being from Bahrain and having taught Interior Design at Ahlia University before going to Newcastle for my PhD, it meant that I had contacts with the university I had previously taught in. It also made sense that Newcastle was the second context of choice as I needed local contacts and it was where I lived. I contacted the lecturers teaching at Ahlia University and they were interested in introducing new ideas around cross-cultural design. Therefore, we worked together to tailor the testing of the creative toolkits to work with one of the interior design studio classes.

As the semester is five months and the duration of the testing needed to be shorter for data collection purposes, we decided that the testing of the toolkit would be done as a 6-week project, and the rest of the semester would be used to focus on another project. I suggested to the instructor of the course to have the students design for Aesop, as some of their store design guidelines are published online, as well as other resources which document every store design result that Aesop have. The instructor agreed to the idea, and we started configuring the six

weeks to suit both the testing of the toolkits as well as the course itself and its requirements. The first week included briefings and research about the geographic context and the brand (Aesop). The week after involved the introduction of the first creative toolkit, which is the spatial localisation, prompts cards. The students were each asked to choose two methods, then perform their own research about the method relating to the site given in Newcastle and the context of Newcastle. Then they were asked to generate ideas and questions that were not answered by the students' individual research, in order to understand what the current information available from a distance provoked. The following week, the third week, included the introduction of the second creative toolkit, which is the multisensory package. Weeks 4, 5 and 6 were allocated for designing while being observed, however, because of the Covid-19 pandemic the students designed from home with no observation. Each week is explained in more detail in Chapter 7.

The multisensory toolkit was configured to the contexts that were chosen for the testing. As decided the creative toolkits were to be tested in context A (Bahrain, with Ahlia University, second year interior design students), and they are going to be designing for context B (Newcastle) from a distance. Therefore, the multisensory package toolkit needed to address the local context of Newcastle. Moreover, the hypothetical site to be designed needed to be chosen carefully, as its specific history can alter the design according to the localisation prompts cards (further details can be found in Chapter 7).

For the site to be designed, I listed several well-known areas in Newcastle that could possibly be designed. That list was narrowed down when discussing with the course instructor on the dimensions and size of a project suitable for the students' level. It was also important that the site was basic enough in order to get approximate dimensions and give them to students. Therefore, the site chosen for the students to design in the end was Grey Street Opticians, at Grey Street, Newcastle, U.K. Grey street is one of the most iconic retail locations in Newcastle and in 2010 it was voted 'Best street in the UK' by BBC Radio 4 listeners. It is also a possible area where a brand like Aesop could open; as the area is populated with many brand retailers.

The data was collected by recording all discussions with the class, as well as individual conversations between groups in week 1 to 3, however due to unforeseen circumstances weeks 4-6 were moved to online learning. The recording was coupled with observation and photographs of the participants during the workshops, while to make up for the lack of observation due to unforeseen circumstances in weeks 4-6, follow up interviews with students were done through recorded video conferencing. The data was analysed using thematic analysis as per the qualitative data analysis explained in Section 3.6.

3.9. Ethical considerations

At all stages, the research followed ethical practices as outlined by Northumbria University's ethics governance process. At any point in the research involving human participants, potential participants were fully informed and provided informed consent prior to commencing participation across all studies. The process in each stage included fully explaining the aims and motivations of the research in detail by providing participants with an information sheet, which was provided to them at least two days in advance of interviews, surveys and workshops.

The researcher also fully explained the nature of the research at the start of the sessions. Should participants have any further questions, the researchers' contact details were available on the information sheet. Participants were asked to return a copy of their completed consent form, and retain their own copy for reference. Participants could only take part if their consent form was completed and returned.

Participants were also given the opportunity to register their interest to be informed about the future developments of the research. Based on the findings of the session, a further 'debrief' sheet explaining the results of the study was produced for this purpose.

The risks that the participants might face included unwittingly revealing intellectual property; disclosing commercially sensitive information; discussing bad practice or difficulties faced in their work (which might not be good if their anonymity were compromised); or not having permission from their employers to participate in the research. There might be potential ethical issues because organisations may fear that the research might reveal commercially sensitive information. In order to minimise these fears, the organisation and the participants were

informed of the intention of the researchers on information sheets. If they preferred, the organisations would be anonymised in the publication.

Participants were anonymised in all transcripts with a code. Extracts of the data made publicly available in publications was fully anonymised in accordance with the UK Data Protection Act. Participants were referred to anonymously in any publications resulting from the project. Data that does not breach participants' confidentiality was available more widely upon request.

3.11. Reliability and Validity

Reliability referred to the concern that the research instrument produces consistent results (Robson, 2002). The aim is to minimise the number and severity of errors and biases in the studies (Yin, 2003).

To maintain a reliable approach with this study, an audit train consisting of full records of all activities, raw data, research notes, and details of the analysis process, was recorded and maintained for each stage of the project. In addition, the activities and the researcher's involvement to understand how the data was produced and how the research practice could be made more reliable, were continually explained and questioned by the researcher, and with supervision. The data analysis was done with the support of supervisors, who acted in ways to question or challenge misunderstandings or unclear data coding and thematic analyses.

Moreover, validity is concerned with whether the researcher sees what they think they see, and whether the findings actually represent what they appear to represent (Robson, 2002; Flick, 2009). First, care was taken to design suitable studies that would provide data pertinent to the research objectives. For each study, the decisions were as explicit as possible, both the collection and the analysis were recorded along the way, in order to fully demonstrate how an interpretation of the data was reached. Furthermore, triangulation was used because multiple methods and different sources were employed. Opportunities were also sought to test and validate the research outputs throughout the research process. This occurred within the validation surveys for example, where more experts in the field were invited to reach a consensus on the gathered data. Another form of validation was testing the toolkit by putting it to use in the workshop.

3.12. Conclusion

This chapter presents the methodology and methods that underpin the research project. It considered various directions and explained how the investigation aligned with the research aims and objectives outlined in the introduction chapter. The appropriate research methodology included explorative research, the *research into* design, and mixed methods but it was mainly qualitative and interpretivist. This chapter also presented the research methods, which consisted of secondary research, preliminary interviews, case studies, validation surveys and a workshop. The next chapter will cover the preliminary interviews, the first set of findings from the primary data collection phase.

Chapter 4: Towards Understanding the Localised Spatial Experience Design Process: by preliminary interviews with professionals from various global brands

This chapter presents the first stage of data collection and analysis conducted in the thesis. It reports on the preliminary interviews conducted with brand management, design and marketing experts. The preliminary interviews were intended to understand the design of localised spatial experience processes within global brands, both in-house and outsourced. This chapter was a pilot in order to test and experiment with the interview technique. At this stage I was talking to professionals and experts for the first time and therefore iteratively learning from each participants about the subject matter and sensitizing to the topic at hand. The purpose was for the preliminary interviews to be iterated on top of with other methods.

The chapter starts with participant information and interview questions. The majority of the chapter reports on insights from these initial interviews. The chapter concludes with a summary of this section's main insights and examines how these findings will be used to develop the next stage of the research.

4.1. Primary Data collection

This data collection procedure and how the participants were recruited can be found in Chapter 3 Section 3.3. This chapter details the final participants' information and codes, as well as the interview questions and the findings.

4.1.a. Participant Information

As discussed in Chapter 3, the interviews aimed to recruit participants in relation to one of the three areas of brand management, design and marketing. The first recruitment approach was done by means of distributing messages via professional networks (i.e. LinkedIn). This was seen as appropriate because it was the easiest way to identify the potential participants and their professional backgrounds and to assess whether they met the set criteria. The criteria were being in the field of brand management, design or marketing and working with a brand that is located in more than one continent in order for them to qualify as global. Seven participants were recruited for the interviews for this stage. The participants were comprised of one in-house designer, one outsourced designer, two in-house marketing managers, two in-house marketing executives, and one outsourced brand strategy director (see Table 2). The global brands that the participants worked for included IKEA, Armani, Dior, and Coffee Republic.

The interviews were face-to-face or conducted through video conferencing tools, and took an average of 20 minutes. The interviews were in some cases brief because at this first stage of data collection, the enquiry was broad and high level, in order for it to be built upon and further explored in the subsequent stages. Also, this was the first set of interviews and my first time interviewing participants for the purposes of research; therefore, they proved an opportunity for me to develop my interviewing skills and refine the structure of questions and how I would introduce topics. At first, the interviews were less conversational and very structured, and the preliminary interviews advanced in accordance with the experience gained from initial interviews.

Table 3: Preliminary Interviews Participant Information

<i>Participant Code</i>	<i>Interview Duration</i>	<i>Medium</i>
Interior Designer A (In-house)	00:10:48	Video Conferencing
Interior Designer B (outsourced)	00:19:15	Face to Face
Marketing Executive A (in-house)	00:26:03	Video Conferencing
Marketing Executive B (in-house)	00:22:57	Face to Face
Marketing Manager A (in-house)	00:29:11	Face to Face
Marketing Manager B (in-house)	00:11:59	Video Conferencing
Brand Strategy Director (outsourced)	00:34:50	Video Conferencing

4.1.b. Interview Questions

The questions asked to the participants began with the general and then moved on to the specific, moving between the individual and the company. The questions asked during these preliminary interviews included:

- What does a brand mean to you?
- How do you manage to develop that brand that you just described?
- What expertise do you need to achieve that? What does your work team look like?
- What are the daily tasks, processes and activities involved in your job?
- What are the methods and tools that you use?
- Do you adapt the brand to the local environment? I know you touched upon it previously but how specifically do you adapt it?
- What do think practitioners would need to make the complexity of translating global brands into local environments smoother?

4.2. Data Analysis

Chapter 3 explained that because of its flexibility, thematic analysis (Clarke & Braun, 2017) was chosen to analyse the qualitative data obtained in the interviews. The analysis led to the review of the codes and their relationships with each other and then the developing of themes, which we report on below. The data analysis was done with the support of supervisors, who acted in ways to question or challenge misunderstandings or unclear data coding and thematic analyses. My analysis of the data led to the development of four themes, namely: “The Importance of Localisation”, “Expertise and Diversity”, “Permission to Adapt” and “Advancing the Localisation Process”. These will each be discussed below.

4.3. Findings

4.3.a. The Importance of Localisation

Throughout the interviews the importance of localisation to the participants and the brands they work for was evident. Firstly, many participants answered that they do practice localisation within the brand they work on, when they were asked in the preliminary interviews. This demonstrated that localisation is widely accepted within global brands; however, it is not always practiced. Some participants did mention that localisation should be discussed within their teams much more than it currently is, and even suggested ways of doing so.

Furthermore, the majority of participants had suggestions when asked what they thought a good solution to deal with translating global brands into local environments could be (Discussed further in Section 4.3.d). Therefore, it is evident that participants did not only realise the importance of localisation to global brands, but also thought it can be taken even further and enhanced. This was stressed by one participant:

“I mean I am having this argument (about localising) everyday with the brand so we really need it.” - Marketing Executive B

Marketing Executive B responded with this point when asked if they would be interested in any potential toolkit created from the findings of this research. She explained, for example, that she argues with the team at headquarters all the time about the need to localise their social media and promotional content to the region she is working in. However, the headquarters team is worried that the overall social media audience would be split if localised pages and forms of communication were created.

4.3.b. Expertise and Diversity

Participants often discussed the relationship between expertise and diversity within globally distributed teams. Expertise was expressed in terms of skills and professional backgrounds that were seen as necessary in the design, marketing and management of global brand teams. This was talked about both in terms of disciplines, such as different design expertise (design, marketing and other disciplines), but also in terms of diversity within teams in understanding different local cultures and ensuring team members brought experiences from different

geographic backgrounds and knowledge. Some participants saw the integration of different geographic backgrounds and knowledge as important because each can bring their own unique perspective that will help localise different spatial experiences. However, the interviews also highlighted that diversity can sometimes be a burden because it potentially challenges global teams in terms of the distribution of the team members at different sites, which creates distance and therefore a need to develop processes to mitigate this.

In the literature review I explained that prior literature had observed the need for different disciplines to come together in order to deliver a successful spatial experience design (Lemon & Verhoef, 2016; Suri, 2003; Kalback, 2016, Best, 2010; Hands, 2008; Steers et al., 2012). The preliminary interviews reinforced the need for a different range of expertise in terms of skills and professional backgrounds, especially in the context of experience design, as multi-disciplinary teams are needed. For example, when asked what kind of expertise is needed to achieve an ideal brand one participant noted:

“I think brands need an entire scope of expertise. So, it cannot ever be just one person. For example there is a graphic designer that does the logo, then there is the design and visual team and the location etc. then you have the business side which navigates the lows and highs of the market and what is actually in need, and then you have - for example for us - the logistics side which manages to replenish and bring in customers. So to me, a brand depends on more than one sector, it is basically a shape that has more than one side and they all need to lean on each other to create one brand. It can never be one person or one discipline that creates a brand.”-

Interior Designer A

Similarly, when asked about the expertise needed within a global team another participant explained: *it requires quite a big mix of people and it is very rare to find one person who has all the necessary skills, so it is a team it is a big team effort.”* – Marketing Manager B.

The need for multi-disciplinary teams when designing for experiences has already been established in literature. Therefore, the findings confirm the need for a range of different skills and professional backgrounds. However, what was added by interviewing the participants (also touched upon in literature) was addressing authenticity in localising by Khan (2018), but the

value of having diverse knowledge of different geographic contexts and settings when localising spatial experiences is not as evident in the literature. The variety of expertise needed discussed by the participants also touched upon diversity in terms of experience, disciplines as well as cultural backgrounds. The expertise had to be divided in terms of team structure and in terms of geography. Participants also touched upon how teams can be distributed. These qualities were dependent on the scale of the teams and the organisations. Some suggested the larger pool of employees be split into smaller teams or individuals focused on a specific aspect.

Marketing Manager A's insight shows that multidisciplinary skills are needed within teams and somehow they have to all relate to each other.

Another participant explained that because they worked in a small team, they were not able to focus on one aspect but rather had to fill in every role that needed to be filled depending on the project. They noted: *"It was a small team but at the same time it meant that we kind of have to go through every single aspect, we were not focused on one specific aspect"* – Interior Designer B. As this participant expressed, having a larger team with each individual focusing on a specific aspect was seen as beneficial, as the individual can focus on their area of specialisation instead of requiring one individual to provide many different areas of expertise.

This same participant also discussed the varying levels of experience and slightly different backgrounds and areas of expertise within their team. They considered this highly useful for the team.

Several participants also referred to the need for local expertise for a specific market. This means that teams have to have a diverse membership in terms of cultural backgrounds and nationalities from different geographic locations. Hence, many participants spoke about the importance of local knowledge:

"I think a lot of it will depend on having local people or local co-workers because they are usually the ones that understand the context. I completely agree with companies and brands who always have to include people of different backgrounds because that's very important especially in growth and in shaping the brand, but I think in order to create this local relevance

you need a percentage of local people who understand the market and have actually grown up in the market.” – Interior Designer A

“I think mostly you need a local person, it is not enough being a Chinese person knowing a lot about Bahrain let’s say. If it is Bahrain you need a Bahraini to tell you.” – Marketing Manager B

“...to be honest, I don’t think you can get away without having local knowledge, the only way to properly translate a global brand into a local market is either to have a local partner in the market or.. I mean you can never, as much as you research and find out information, you can never really replace true local knowledge.” – Brand Strategy Director

“If it was just like one type of mentality it just limits you more than if it was a mix of different cultures, as everyone brings something different to the team.” – Marketing Manager A

The need for a diverse range of expertise both in terms of discipline and locality can however, be a burden. The need to have a diversity of cultures represented on a team means finding solutions to balance between the expertise and discipline experiences, as well as local knowledge of a specific market. Some participants referred to how the person must be from that area, as mentioned in the quotes above. Yet others mentioned traveling as a way of having cultural awareness and sensitivity, as expressed by one participant:

“Our company is a small family office where everyone is young, so we are young and we are local, but we have travelled, we see a lot of new concepts so we have that experience with a bit of that local knowledge.” – Marketing Manager A

Another participant mentioned about traveling to places:

“In order to make the translation process smoother, practitioners need access to the cultural history of the place so for example when it comes to Bahrain, I like being able to go to specific places like a Bahraini museum or to Muharraq souq [traditional area] or somewhere with a lot of history where they can absorb that and I think that in some countries it is easier than others and you have to kind of know where to go. I think just being able to go to these places and see it all around it will make it easier to then design based on what that space holds.” – Interior Designer B

This theme focused on the expertise and diversity needed within global teams. The need for diversity can be a burden because it means that team members have to be geographically distributed. Some teams consider it impossible to get people of specific cultural backgrounds onto the team or that this is not necessary, and they prefer to travel to locations to get inspiration instead. The next theme will touch upon other considerations that come to light due to distance.

4.3.c. Permission to Adapt

The need to adapt localised spatial experience design and at the same time not steer too far from the brand's core image was very important to participants. Therefore, the guidelines of many global companies provide some flexibility for the local or regional teams to adapt the branding as they see fit. For example, one participant working at the regional Middle East office for a global company based in Paris explained:

“Paris is central [central office] so they send us central guidelines to all of the markets including Asia, Europe, Middle East, and Africa etc. Then it is our job, they call us operational marketing because we will take it and localise it based on our environment, our culture, our clients, all of that.” – Marketing Executive A

In the case of large global corporations, there is usually more than one team in different parts of the world with one main central office. When asked if they go back to the parent company from some adaptation, this participant explained:

“No, we do not go to France for permission on localising, this would be handled by local teams here. So it would be the UAE manager, the business development UAE etc. So we have a local team for this as well.” – Marketing Executive A

This participant notes how the local offices of their brand practices some kind of flexibility in adapting the brand guidelines sent to them from main office. This means that the guidelines are not rigid and can be discussed. For example at main office, participant marketing executive A mentioned that because of the nature of the UAE market, some customers can book the entire store for the day to browse, which gives the customer a different experience rather than just visiting normally, however it is not part of the guidelines. This was done when the need was

seen and permission was taken from the central office. This encourages localisation, as it allows local team members to make changes tailored to their geographic location.

Furthermore, a marketing manager working for UK-based companies explained that the final decision goes to the central office, as there is some flexibility. However, any adaptations need to be approved by them:

“It’s not always easy but it’s a task where we have to go back and forth, and it has to be approved by the mother brand as well. If we go too far, they will pull the brakes for us – okay this no longer looks like us. So we are trying to strike that balance.” – Marketing Manager A

Another participant based in the Middle East working for an Italy-based brand reported that there is contact with the parent company when they call for permission when adapting:

“I try my best to adapt the brand into the local environment but it is not that easy ... today’s call with the global office based in Italy is about that as well... so I try and I hope I can win, they are nice, flexible, they are supposed to be, so I hope we can get this done..” – Marketing Executive B

This theme highlighted that in the participants’ cases the central office is where major adaptations to the localised spatial experience are approved. Also, the participants suggest there is a lot of human negotiation to adapting a brand, and getting authorisation for this. This shows that often it is not a clear formal process, but something negotiated on a case-by-case basis. This also shows that local counterparts are given some flexibility in the decision, supporting the decolonisation of design. While the headquarters mentioned were Western in some instances, the local team in the UAE was given permission to adapt as they saw appropriate, but within limits.

4.3.d. Current and Suggested Localisation Methods

Most participants agreed that the localising process currently in place where they work could be advanced and improved. All the participants discussed some tools that helped the localisation process, such as reports, and basic requirements such as guidelines, or software to share information across teams.

It was also explained that some companies provided an annual or bi-annual report of the different diverse markets including information such as demographics, cultural holidays and dominant languages.

Practices like these demonstrate that a brand values localisation, and it takes the time to inform the team about the latest data on the geographic context and setting.

This participants' explanation highlighted that not only is it important that the brand understand the importance of localisation by informing their team about annual data, but that the team is also appreciative of this aspect and understands its importance. However despite the tools and processes available, challenges still remain for many. Several participants found it difficult to balance adaptation and consistency. One participant expressed:

“Of course the communication of the brand depends on the voice, depends on perspective but it should all be one nice, neat package with its own DNA [the developed brand image]. It should not deviate from the DNA, because you have to always stay in character if you want to have a long lasting brand you have to be consistent with your message that will stay for a very long time.” – Marketing Executive A

Another participant explained further:

“If you localise it too much you are sending a different message. But if you are doing it for only one or two campaigns I think it is okay. If you continuously send this new message that is too localised, it risks making the whole company as a global company look a certain way whereas the appeal could have been that it is French. Or like you said there is a certain appeal with the fact that it is international or it is from California like the beach bum or whatever, there is an appeal to that. So I think it is a fine line. You don't want to redefine the company and you don't want to redefine the DNA you just want to localise but not too much.” – Marketing Executive A

Several participants also discussed the issue of retail space when it came to translating global brands into local contexts. One participant (Marketing Manager A) reported that the parent brand based in the UK usually utilised smaller-sized retail spaces, while the sites in the country the participant was based in were much larger. In addition, the new site in the franchise

country was located next to universities, which was not always be the case in the brand's original country, so it needed to be adapted according to the audience. The participant mentioned:

“Coffee Republic, if we were to do it like in the U.K. which is a small corner coffee shop, very high street, there is nothing, no extra elements where people can sit, it is just where people can grab their coffee, read a quick newspaper and leave, but in our location - I am talking about Riffa specifically - we have a huge 600 square meter location, so it is quite big.” – Marketing Manager A

This shows that the space available differs in different countries. When moving the same brand to another geographic context or setting, the audience also differs because of their lifestyle and what they would need from a spatial experience. The participant continued:

“We had to do something a bit different or custom let's say for what is surrounding our coffee shop, which is two universities, we have the University of Bahrain close by and we have RUW (Royal University for Women) in the corner also. We knew that our main customers would probably be students, we customised it to have a quiet zone, which is completely isolated – sound isolated – so that students can go in and study quietly. We added a library, we added power sockets next to literally each and every table, so that we know people need to plug in their devices, all of those little add-ons are not there by the brand, its not like they tell you to do that. It was completely our idea to highlight those elements and customise it to that local market or area.” – Marketing Manager A

This shows that localisation is someone catering to the people around the area not only in terms of local preferences, aesthetics or taste, but also in terms of demographics.

Relatedly, another participant (Interior Designer B) discussed the design issues of working with pre-existing buildings. This is a general issue that is only amplified by localisation:

“They have I think three or four hotels. They are based in Lebanon and they wanted to bring that boutique hotel experience to Bahrain. So they had asked us to look into that direction of what they had before but we also had the limitation of a pre-existing building. We focused on the kind

of feeling, the colours they used, the materials they used and we tried to implement that into something that was going to be in the souq in Manama. So it was really juxtaposed to the kind of environment it was usually in.” – Interior Designer B

Marketing Executive A stated that the key to localising successfully is knowing the details of the culture of the people in that geographic context and setting:

“You need to know about the country, you need to know about the people, you need to know about the religion, about the religious and cultural holidays, things about the culture. For example Arabs are a bit late, they are a bit relaxed, the Germans they are super on time. You just need to know basic things about people.” – Marketing Executive A

Interior Designer B mentioned that the details about the culture are difficult by means of desktop research, saying:

“It was difficult firstly because we had never met the clients until the day of the presentation. So it was just based on – I remember us just reading reviews of trip advisor on what people thought of places in other places in the world just to get a feel of what it was like to be in one – and then try to adapt the space”- Interior Designer B

Both Marketing Executive B and Interior Designer B said that knowledge of the cultural history of the place helps when localising a space to the geographic setting and context. This cultural history of the geographic context is better experienced personally. When asked what they think practitioners would need to make the complexity of translating global brands into local environments smoother they said:

“The access to the cultural history of the place, so for example someone has come to Bahrain, like being able to go to specific places like the museum or to Muharraq or somewhere with a lot of history that they can absorb and I think that in some countries it is easier than others and you have to kind of know where to go. I think just being able to go to these places and see it all around it will make it easier to then design based on what that space kind of holds.” – Interior Designer B

“I think number one is awareness, bring them here to see the market, I don’t know what the tool could be but the problem I am facing is that they need to come and experience this market, see for themselves, if not possible, just be associated with those in the market, the locals, yeah try to have this feel of the local, so you know what they need.” – Marketing Executive B

Keeping these challenges in mind and the existing process and tools, participants suggested ways to improve the localisation processes they currently used or were put in place by the companies they worked for. The suggestions reflected the need to understand the cultural history of the geographic settings and contexts, the preference to experience it personally rather than passively, as well as budget constraints. The suggestions revolved mostly around bringing out intangible elements in order for people to experience the culture but from a distance, due to time and budget constraints. For example, some participants mentioned a multi-sensory report saying:

“Yes, you can either send me a boring report that is stacks of paper, as if you are a consultant, or you can make it something that is a bit more interactive. As we as a brand do for our clients, we want to be interactive with them. We want them to interact with us because we know it creates an experience and it is easier to remember, easier to understand so it is basically they have applied all that brands want to apply in the report. So instead of it just being a boring paper, maybe it is yes, to introduce this is the local food, this is how they like to smell, this is what oud smells like, this is what amber smells like, whatever the product category is, videos.” – Marketing Executive A

“Okay if I were a brand and I am looking at what they do in Iceland- somewhere I have never been and I have no idea about – instead of going online to read and see I would like to physically touch and compare it to what I have. If there was some kind of package that I could order that would give me the history of the place, the crash course kind of. Even the kind of food that they eat there, the textures of these things. But yeah I think it has to be physical because there is only so much you can get from being behind a computer screen.” – Interior Designer B

Other participants suggested a “feel filter”, bringing attention to intangible elements as well. The participants suggested that the design of the brand’s retail spaces be guided by intangible

statements of how you want the brand to be perceived, which are then translated into various aspects of the design.

“We wanted to have a certain feel to it, minimal, modern, sleek, certain things that we associated with what our concept should be. So from that we define the main characteristics that you want your brand to be identified with and you develop it further from that.”

– Marketing Manager A

“It should be a decision of how you want to be perceived by your client or by your potential client and to have this thought from the beginning and then to execute and implement it without ever deviating from this thought. You have to stick to this thought and just continue to implement like that.” – Marketing Executive A

Another participant mentioned the importance of having a word filter, where the final design is judged against certain words set by the brand that represents it. However they warned against its limitations. The participant (Brand Strategy Director) brought to light the subjectivity of such words, as they are intangible, and when translated to a tangible form, different people might not experience them the same way. The same participant mentioned the importance of design when it comes to translating those qualities into a tangible form.

4.4. Discussion

The preliminary interviews confirmed the importance of localisation, as discussed in the literature review. The participants in the preliminary interviews even thought that they were currently weak points in the localisation processes, offering solutions as to how it can be taken even further. Some solutions included the need for a more interactive, and multisensory means of obtaining information about a geographic context and setting from a distance. Moreover, the interviews showed that both expertise and diversity are needed in global brand teams, however there is tension in the need to include both of these within global team dynamics. Sometimes certain expertise is needed in terms of professional skills and therefore the need for diversity is downgraded, and vice-versa. Therefore, most teams have processes, tools or methods in place to fill the gaps that these tensions bring forward. Furthermore, the interviews showed that there is usually a main office maintaining the consistency of the brand by applying

certain rules, but these rules are flexible depending on how the local teams see fit. There is also a lot of negotiation when it comes to localising spatial experience design, as evidently it is not a fixed process.

However, as only one person from each brand was interviewed and not the whole team, the interaction between the team members and the different departments remained unclear. Interviewing a team would reveal how the different members and departments are linked. As the interviews were short, more detail was needed, such as how in-house and outsourced teams differ. Therefore, studying cases in more detail would provide more insight into a single case rather than less insight into many cases.

4.5. Conclusion

In conclusion, the preliminary interviews provided a starting point whereby the localisation process within global brand can be understood. This chapter was a trial to sensitivities and key issues that was responded to more thoroughly in Chapter 5. The data analysis showed that a variety of expertise is needed in terms of skills, as well as an understanding of the various local contexts. This challenges the way in which teams are distributed across different geographic locations and puts a strain on communication. Global brands tend to have processes in place to mitigate that distance; sometimes this is done through travel and other times through detailed reports. However, balancing between adapting and localising remains a challenge between team members. In order to advance the process currently in place many participants suggested a focus on intangible aspects, such as interactive reports of the use of “feel filters”.

In the end, the main contribution of the preliminary interviews is to make sure that team structures were taken into account in the next stage when recruiting participants, as well as in the questions asked. It was also seen through the preliminary interviews that the questions addressing solutions and advancements of the localisation process need to be expanded upon and better interlinked with the aim of the research, to help address this issue with the participants in the best possible way.

Chapter 5 – From Global Brand Management to Local Spatial Experiences: The Cases of Starbucks and IKEA

The previous chapter reported on the preliminary interviews, which provided a starting point for understanding the process of localisation within global brands. My analysis of the preliminary interviews highlighted the importance of localisation and the need for localisation to be more advanced in order to be more meaningful. However, what is less clear from these preliminary interviews is how these brands come to manage the adaptation and integration of their global brand into geographically and culturally diverse spaces, and the roles design and organisation play. Therefore, looking into how two successful brands achieve this will offer an opportunity to understand the practices of design teams and design's role in creating appropriately localised spatial experiences for global brands. To build on the findings of Chapter 4, this chapter presents the findings from two case studies of global brand management and localisation, focusing on the cases of Starbucks and IKEA. The chapter describes the reason for selecting these companies for the case study, why interviews with people from these companies were chosen, the study participants' backgrounds, secondary resources that led to the formation of questions for the semi-structured interviews, and findings from the interviews with professionals from each brand's design and brand management teams. The chapter concludes with a discussion of the main insights including the value of localisation to the participants as well as the challenges they face in creating designs over long distances in globally-dispersed teams. Finally, the chapter discusses possible solutions to the challenges found within the design processes, as outlined by the participants.

5.1. Choosing the Case Study Brands

The element of the process of selecting the case studies was to check the leader board of global brands (Forbes, 2019; Interbrand, 2019; Financial Times, 2019), and write down a list of brands that could be investigated. The list was then narrowed down after looking into whether each brand had a physical store. A brand that had physical store was seen as important, as this research is looking at localised spatial experience design. After the narrowed down list was finalized, the brands were contacted in order to see whether any of the members of the teams in marketing, brand management and design were interested in being interviewed. Some team members for some of the listed brands were interested, however the number of interested

members per brand was not enough to qualify as a case study, as I required at least three or more participants per investigated brand.

The companies selected for this study were Starbucks and IKEA. Both companies are considered valuable global brands with many stores around the world and a continuous presence at the top of global brand leader boards (Forbes, 2019; Interbrand, 2019; Financial Times, 2019). The study of these brands, and how they support brand development over different markets worldwide, therefore offers a potentially promising starting point for understanding how a global brand can maintain effective collaborations within organisations and produce successful localised spatial experiences.

5.2. Interviews

The insights from looking at previous findings as well as into the background context of the case studies (Starbucks in Section 5.5. and IKEA in Section 5.6.) were used to formulate initial questions to collect empirical data. These questions were intended to explore issues such as: (1) understanding a design team's structure, its members' and their competences; (2) understanding the process used for localisation; (3) understanding the tools used for both localisation and collaboration between the teams.

I conducted nine in-depth semi-structured interviews in total with members of both brand's teams. Participants were recruited using purposeful sampling. The first recruitment approach was via messages distributed on publicly available professional networks (e.g. LinkedIn). Then, during interviews, participants were asked to suggest other participants who could be interviewed. The interviews were conducted in person or via video conferencing (e.g. Skype) depending on participants' availabilities.

The interviews began with a general introduction from participants about their role and then moved towards specifics, discussing the individuals' own work, the wider design team they belonged to and the team's position within the wider company. In the first part of the interviews, the participants were asked about their work on a daily basis and what a typical project looked like. The participants were then asked about their role in the context of a wider branding team in order to understand the bigger picture. We then moved on to ask about

specific stores that they found successful, and what the representation of global identities in local territories meant in relation to those particular examples. Finally, we asked them about the main challenges they faced in terms of localisation of spatial experiences and we discussed initial suggestions about what kind of support would be useful in tackling such challenges.

5.3. Data Analysis

A thematic analysis (Clarke & Braun, 2017) was used to analyse the qualitative data obtained in the interviews. The analytical process followed the outline in Section 3.6. The process led to us reviewing the codes and their relationships with each other and then developing themes, which we report on below.

5.4. Case 1: Starbucks

5.4.1. Background Context

Khaleeji Times, a newspaper published in the United Arab Emirates, published an article in 2010 titled 'Global Brands, Local Tastes' (Khaleeji Times, 2010), which made the case that brands such as Starbucks were too standardised (i.e. kept the same throughout different countries rather than being localised to the different geographic settings and contexts). My interest for the present research is based on the observation that Starbucks has shifted over the last ten years and seemed to be picking up on consumer preference for localised experiences, and dissatisfaction with its standardised coffee shops. In 2012, two years after the Khaleeji Times article was published, the company opened 'The Bank' store (designed by Liz Muller) in Amsterdam. The corporate website stated that this shop was 'a glimpse of Starbucks' vision for the future' (Starbucks, 2012) as they state in the article that it is an exemplary store portraying a local geographic context and setting. The design of the shop was localised and highly individualised, revealing a radical aesthetic departure from the usual standardised Starbucks stores. The strategy seems to have been successful, as Starbucks has since designed localised shops for most of its locations.

Many examples of localising spatial experiences can be seen by reading Starbucks' stories and its news section on its website. Articles demonstrating a balance between locality and consistency include "11 Stunning Starbucks Stores Around The World", where local differences in the variety of examples offered are on very evident display (Starbucks Stories, 2017). Another

includes an article titled “Five Starbucks Store Designs Inspired by History”, which states “Every neighbourhood has a story, and often that history can be inspiration for Starbucks’s store designers.” (Starbucks Stories, 2016). For example, the Starbucks store in Miami, Florida (Figure 19a), showcases the colours and textures of the surrounding beaches (Starbucks Stores, 2017). Figure 11b demonstrates that when this store in Paris, France, was created, the building it was housed in was refurbished to ensure that its history was maintained. This included fully restoring the ornate and intricate 19th-century ceiling murals and motifs to their original state and revealing their true colours and historical qualities (Starbucks Stories, 2017). The New York store at 11 Penn Plaza (Figure 19c) is inspired by nearby Penn Station and the Hudson Rail Yards, with a design that conveys the electric energy of the city. Illuminated tracks snake across the ceiling, drawing customers in from the busy sidewalk of 32nd Street. The work of artist Jake Wallace, influenced by the industrial architecture of New York City and the textures of the railroad system, shines above the back bar (Starbucks Stories, 2017).

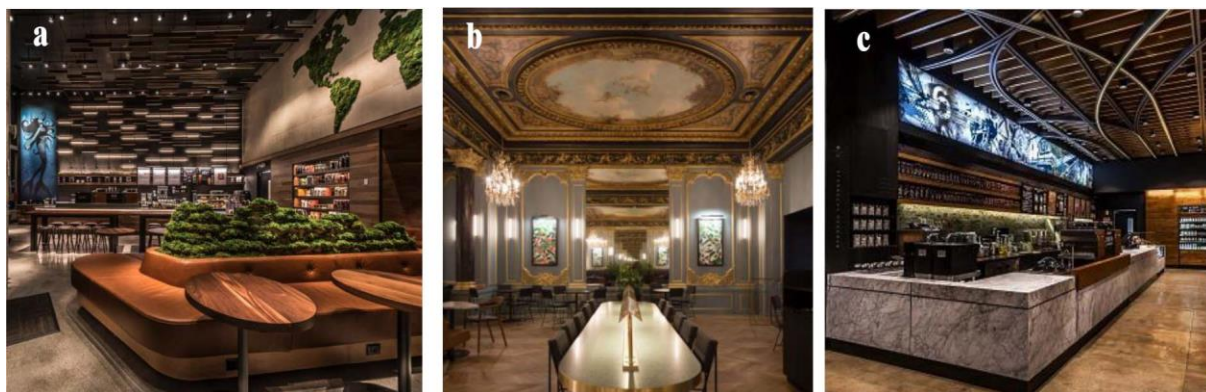


Figure 19: (Left to Right) a) Starbucks Store, Miami, Florida. b) Starbucks Store, Paris, France. c) Starbucks Store, 11 Penn Plaza, New York. Source: Starbucks Stories, 2017.

Starbucks also sometimes collaborates with local artists (Figures 20a, 20b) when creating stores in new locations. Commenting on a recent collaboration, Starbucks stated: “The mission and values of the company talk about inspiring and nurturing the human spirit one neighbourhood at a time [...] Art is a powerful way to bring those ideas to life, and there’s no better way to do that than by creating jobs for artists in the communities we’re part of” (Starbucks Stories, 2017).



Figure 20: Examples of Artwork done in partnerships between Starbucks and local artists. (Left to Right) a) Chilean artist Nicolas Arroyo's hand-painted mural in a Starbucks store in Santiago is a visual collage that evokes city life. b) Kim West's mural interpretation of a coffee landscape in Terminal 3 at Los Angeles International Airport. Source: Starbucks Stories, 2017.

The Design Council is an independent charity and the UK government's advisor on design. By reviewing The Design Council's secondary literature, specifically a report titled "Eleven lessons: Managing Design in Eleven Global Brands: a Study of the Design Process" it's possible to determine that Starbucks has an in-house design team split into two main categories: 'The Starbucks Global Design Team' and the 'The Store Design Team'. However, it should be noted that outsourcing is also used for some occasions. The Design Council (2007) identified that 'The Starbucks Global Design Team' is responsible for the delivery of all in-store collateral and packaging, for the design of most advertising and marketing materials, and for a visual merchandising group that works on visual presentations in the stores and of the products. A separate store design team is responsible for the design of the furniture, fittings, and the layout of Starbucks' spaces.

By investigating images of Starbucks around the world it was understood that there are examples of collaboration; however the literature did not explain how these collaborations are set up.

5.4.2. Starbucks Participants Information

Starbucks interviewees were selected from two different Starbucks offices with two different store design teams (Figure 21). Three of the participants were based at the Amsterdam office and were responsible for the Europe, Middle East and Africa (EMEA) markets, while one of the participants based at the Miami, Florida office was responsible for the South East America, Florida and Latin America markets.

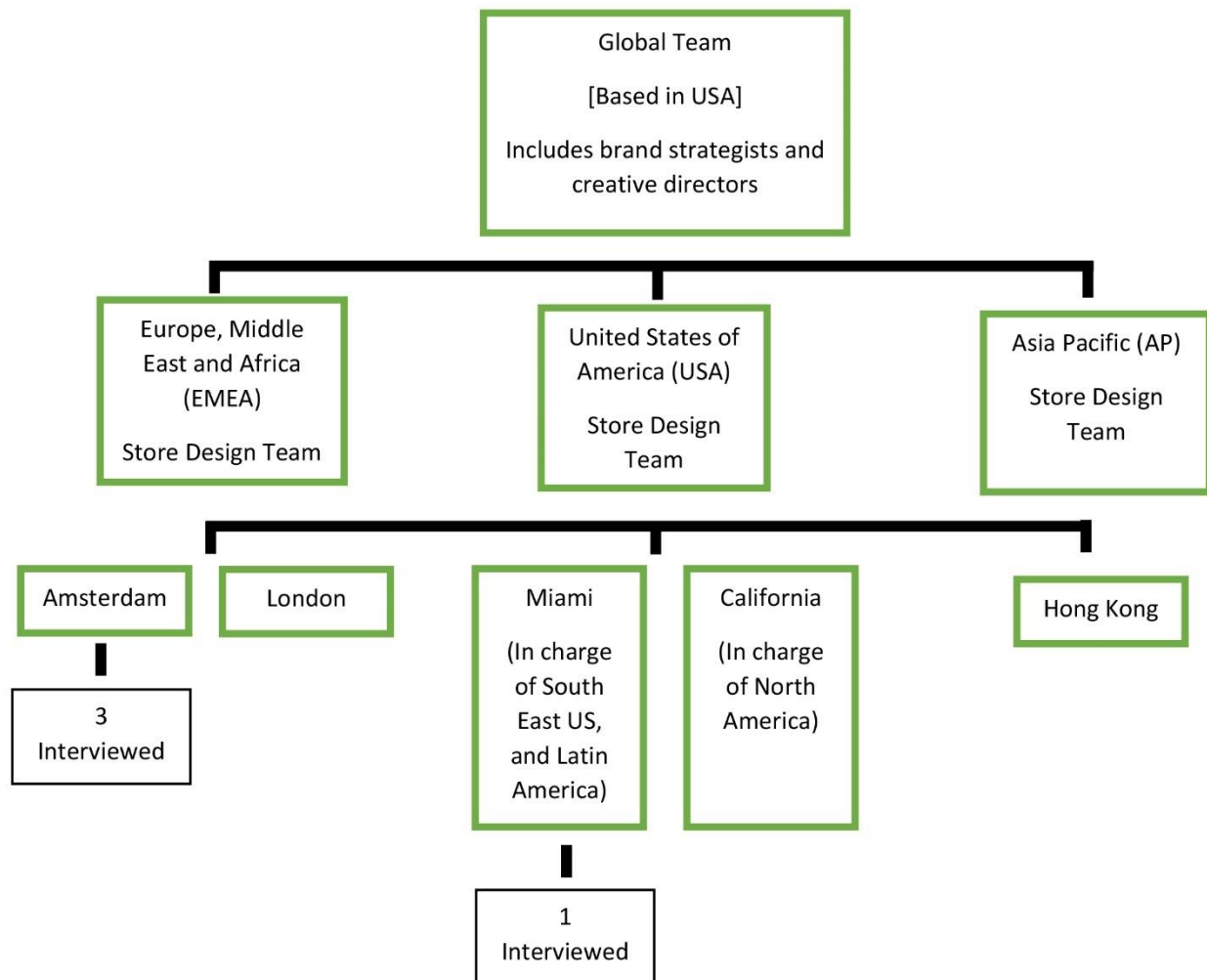


Figure 21 Starbucks Participants Overview and Context. Source: Author.

Table 4: Starbucks Participant Information

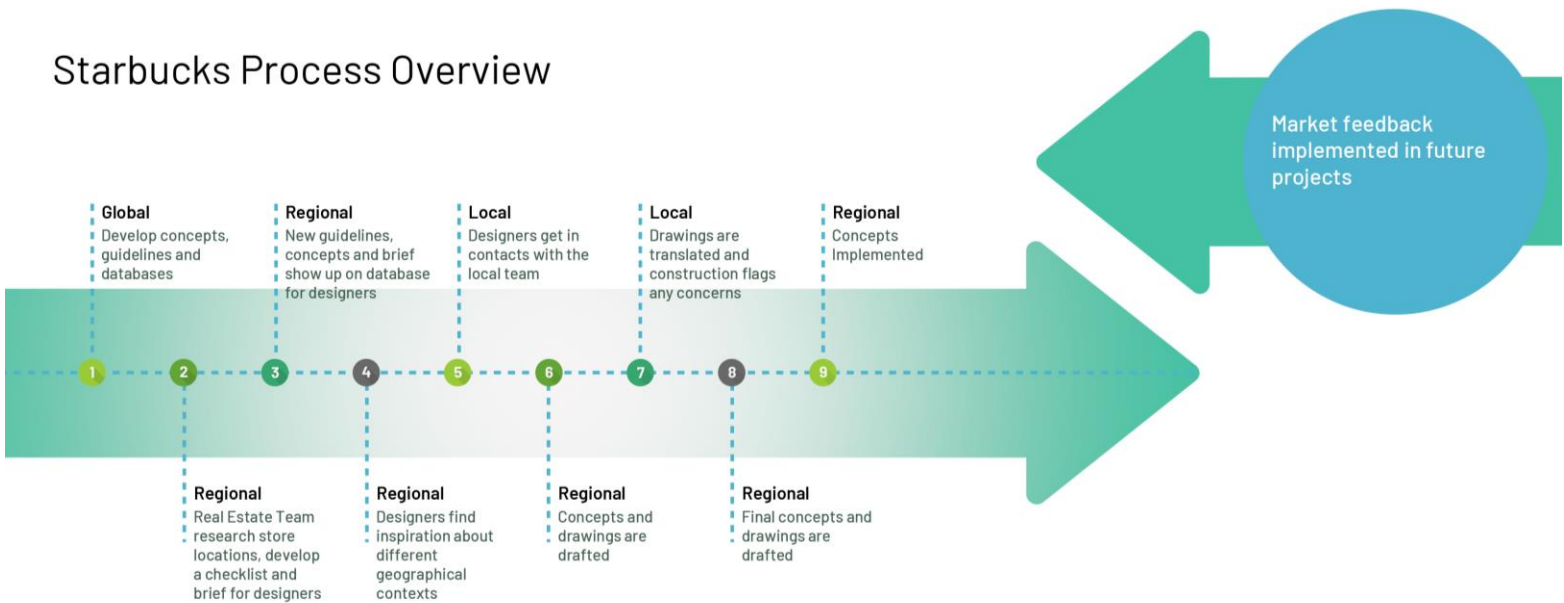
<i>Participant Code</i>	<i>Job Title</i>	<i>Interview Duration</i>	<i>Medium</i>
Starbucks			
Store Designer A	Senior Designer – International Store Design & Concepts at Starbucks EMEA	1:03:02	Video Conferencing
Store Designer B	Interior Project Designer at Starbucks EMEA	27:58	Video Conferencing
Designer Manager	Design Manager at Starbucks EMEA	51:30	Video Conferencing
Store Designer C	Store Designer at Starbucks, Miami, U.S.	37:28	Face to Face

5.4.3. Starbucks Findings

a. Starbucks Process Overview

Figure 22 Starbucks Spatial Experience Design Localisation Process. Source: Author.

Starbucks Process Overview



The following diagram illustrated in figure 22 visualises the process that Starbucks follows in order to translate their spatial experiences into different geographic settings and contexts. The process will be referred to throughout the discussion of the Starbucks findings.

b. Evidence of Localisation

Findings from the interviews confirmed that Starbucks practices localisation in relation to spatial experiences. Participants discussed the importance of localising and suggested that even though it is practiced, it can be further embedded and taken even further. For example, a participant from Starbucks said:

“We as a design team are always interested in the local cultures, including for example; global artists, local events, and right now for example we make use of the internet, design websites, but I think it could be really interesting to have a platform that goes a bit deeper into a local culture, giving an image to an outsider of what is really important for a specific area [...]. It would be interesting if it goes deeper than just scratching the surface because then you can be

more relevant in your designs and you can connect deeper into the local culture.” -Design Manager

Another participant from Starbucks confirmed that localising is practiced but needs to be further embedded into the team culture suggesting:

“We do what we can but it is a challenge working for the world and making stuff that people can claim more so their own. It is a big challenge honestly. Some people like it more than others.” – Store Designer A

“One of the things I miss when we come together as a design team is that we do not talk about culture as much as we need to.” – Store Designer A

While the participants know they should practice localisation, the interviews showed that they often struggle in terms of coming together to create localised designs that local people relate to and in finding the information needed to develop such meaningful localised designs. In conclusion, the interviews showed that localisation is valuable to Starbucks, and participants suggested that there is potential for localisation to be taken even further.

c. Design and Distance

As seen in Figure 14, the Starbucks participants are located regionally and are not necessarily geographically local to the store(s) being designed. Therefore, their process begins with the real estate team, which identifies the market drivers requiring a design response. They research geographic areas and potential locations for new stores that could benefit the company, and develop a plan and budget for that specific site in the form of a brief. The brief shows up for the store design team on a database with all the new store projects and on-going renovation projects of existing stores. Any issues are flagged on the database so that they can be discussed with the real estate team. When the issues have been resolved, the store design team begins to seek inspiration, sometimes this is done by travelling to the location of the new store or its surrounding areas, but typically travelling is only for senior designers and managers. Those who get to travel usually bring back local products for the rest of the team to try. As the design manager at Starbucks observed in their interview:

“For example, if we travel and that is always a big budget issue, we cannot endlessly travel; especially the project designers, they cannot endlessly travel. Then something that we always try to do, for example, is bring a few products that are locally relevant and they can be things to eat, coffee that is not from Starbucks but another brand, local tea, even some other products.” – Design Manager

The store design team tries to find other ways to gain inspiration in order to work around the issue of not always being able to travel to a specific location. They look at cultural references in books and movies, as well as search online. A designer commented:

“It is not asked for us but we take initiative on, let’s say, research and books. We watch films; we would do anything just to absorb and to actually understand who are the people we are working with.” – Store Designer A

The store design team can also contact the local team (this mostly includes construction teams but does not include designers, depending on the location), to get more locally-relevant information, although the information is not always reliable and accurate:

“So we try to do as much as we can and also to work closely with our guys on the ground. Normally they give us feedback on things and the problem with that is we would expect a bit of quality or much more insight from our partners but we don’t always get that.” – Store Designer A

After seeking inspiration, initial concepts are drafted. These concepts typically incorporate pre-established furniture, and use a material catalogue for each region and an art program where the store design team can choose from pre-made art. Sometimes the latter may include collaborations with local artists from that specific region. One participant mentioned:

“We have a program called the Starbucks art program, run by somebody in the US. It is a person that reaches out to artists around the world and they create pieces for us and that is renovated constantly as part of our catalogue. That means that it is a specific type of art that will run for a certain amount of time so it does not become repetitive. It also means the artist is being paid fairly as the rights are purchased from them for that specific piece [...] So we have that as tools

to implement and to tweak in our stores and we do the same with the furniture.” – Store Designer A

In terms of feedback, the initial drawings are handed over to representatives of the market for feedback. The feedback is taken into consideration and the final concepts and drawings are drafted. If required, a local external firm can translate the drawings into the local language to help construction teams understand.

After the design has been implemented, final market feedback is gathered. However, feedback is used in the next project or renovation rather than being fed back into the same project because it is not financially feasible to rebuild the project following feedback at this late stage.

“We make so many stores in a short time that we unfortunately don’t have time to reflect a lot. I think we reflect on the go.” – Store Designer A

There are weekly meetings for each market within the store design team. Therein, the different teams meet to talk about relevant challenges, so it is important for the design team to present their project in order to receive feedback from the consumer base.

Much like the preliminary interviews, there were also suggestions that focusing on intangible aspects and delivering an overview of a location delivers the information creatively. For example, one participant suggested a tool that included an overview of the region, and provides a presentation explaining the country in ways other than words:

“Maybe it could be interesting to have an overview -this may be tricky - of a geographical region. This means if I will do a store imagine in ... Italy that somehow I will have a kind of presentation a more solid structure of the country itself ... it is like when you search Wikipedia for the country itself you have a text explaining it ... but what if I am just giving a loose idea, what if this becomes instead of words it could be palette with different images to have a palette of the country itself or it could be aromas, it could be a cinnamon stick.” - Store Designer B

5.5. Case 2: IKEA

5.5.1. Background Context

Operating in a different commercial sector to Starbucks, IKEA similarly localises to different geographic settings and contexts. Like Starbucks, IKEA sometimes collaborates with different individuals and companies to develop different pieces for their product range that are seen to better align with the aesthetics and practices of different cultures. For example, a 2019 Dezeen article offers an example of IKEA teaming up with top African designers to launch a furniture collection (Figures 23a, 23b).



Figure 23: IKEA partnerships with top African Designers (Left to Right) a) Product inspired by hair. b) Rug featuring geometric patterns. Source: Dezeen, 2019.

However, of more direct relevance to the focus of this thesis, it is possible to observe some IKEA stores making adaptations in terms of the ways their products are laid out in stores to be contextualised for the local context (Figure 24a, 24b). For example, the IKEA store in Bahrain mimics the local environment where outdoor furniture is displayed, while the building materials mimic balconies, by using commonly-used regional materials.



Figure 24 A,B Outdoor Furniture Displays at the IKEA Store, Bahrain. Source: Author.

In their paper titled “International Expansion Through Flexible Replication: Learning from the Internationalization, Experience of IKEA” Jonsson and Foss (2011) discuss IKEA adapting to local contexts from a business perspective. They give further insight in terms of the construction of teams within IKEA and more specifically those who are more involved in translating the global brand into particular geographic contexts and settings. They explain that local adaptation, for example, by country-specific IKEA service offices, results in explorative learning. These include dedicated units responsible for intra-firm knowledge sharing, as well as organizational principles, such as corporate values that stress the importance of co-workers questioning existing solutions and continuously engaging in knowledge sharing. IKEA thus succeeds in combining the advantages of replication with the advantages afforded by being able to adapt and transfer the resulting new knowledge across the multinational company – a practice that Jonsson and Foss (2011) refer to as “flexible replication”.

Jonsson and Foss (2011) also explain that the internationalisation process starts from domestic markets, moves on to culturally and/or geographically proximate countries, and subsequently moves to more culturally and geographically distant countries. At the same time, they also highlight some of IKEA’s failures where the company struggled to localise its brand’s principles to different geographic contexts. For example, one particularly important failure, as Jonsson and Foss (2011) explained, was the 1985 entry into the US market. A typical problem of the US entry was IKEA’s unwillingness to increase the sizes of beds and kitchen cabinets, because part of its concept was to offer a single, global range. In another more recent example, IKEA had the

ambition to source more locally within its market units (southern Europe, northern Europe, eastern Europe, and North America) and adapt more to the markets of these regions. However, the strategy to adapt was not successful, and resulted in a large and highly dispersed product range, which conflicted with the core IKEA concept. The manager that Jonsson and Foss (2011) interviewed explained that it “was ultimately Ingvar Kamprad (founder of IKEA) himself who said stop; we shall be one IKEA, one business idea and one culture” (Jonsson and Foss, 2011). These kind of events prompted broader reflections on the localisation that IKEA was implementing, and amply illustrate what they refer to as the “adaptation–replication dilemma”. These two examples of failure also highlight different extremes. One was a failure because it differentiated too much to different markets while the other is a failure because IKEA did not adapt. As mentioned in the preliminary interviews, striking the balance between the two is one of the main challenges global brands face when adapting.

When it comes to the store format and design, Jonsson and Foss (2011) explain that IKEA stores follow a fixed basic format, although the size of an IKEA store has increased over the years. Currently the smallest standard stores are 32,000m² and the largest are 45,000m². Having standard stores is also in line with the general cost-efficiency goal. As land is expensive to buy in some markets, IKEA has currently developed buildings with several floors, with parking lots both in the basement and on the roof. This is an example of how the concept needs to be adjusted to meet the particularities of specific geographic settings and contexts. In the smaller stores, a selection of furniture is displayed in room-like settings, adjacent to which is the self-service warehouse section, with the ready-to-assemble furniture placed in boxes on pallets. All stores also follow a “traffic flow” organisation that takes customers through the store in a manner that maximizes their exposure to IKEA products in different settings (Bartlett, 1990). All stores have a restaurant with a similar menu (IKEA is Sweden’s largest food exporter), in-store childcare in the form of supervised play areas and ballrooms, hot dog/hot sausage stands, and food markets with traditional Swedish food near the exits. The characteristic blue and yellow facade emerged in the mid-1970s, and has been an IKEA fixture ever since.

5.5.2. IKEA Participant Information

IKEA has its own in-house design team that is also globally distributed, much like Starbucks. They have different teams for different regions. However the teams are grouped very differently as seen in Figure 25. Instead of grouping all the designers concentrated regionally, IKEA has local designers dispersed into each one of their stores. The IKEA participants were selected from three different IKEA offices including Gateshead (UK), Bahrain and Jordan.

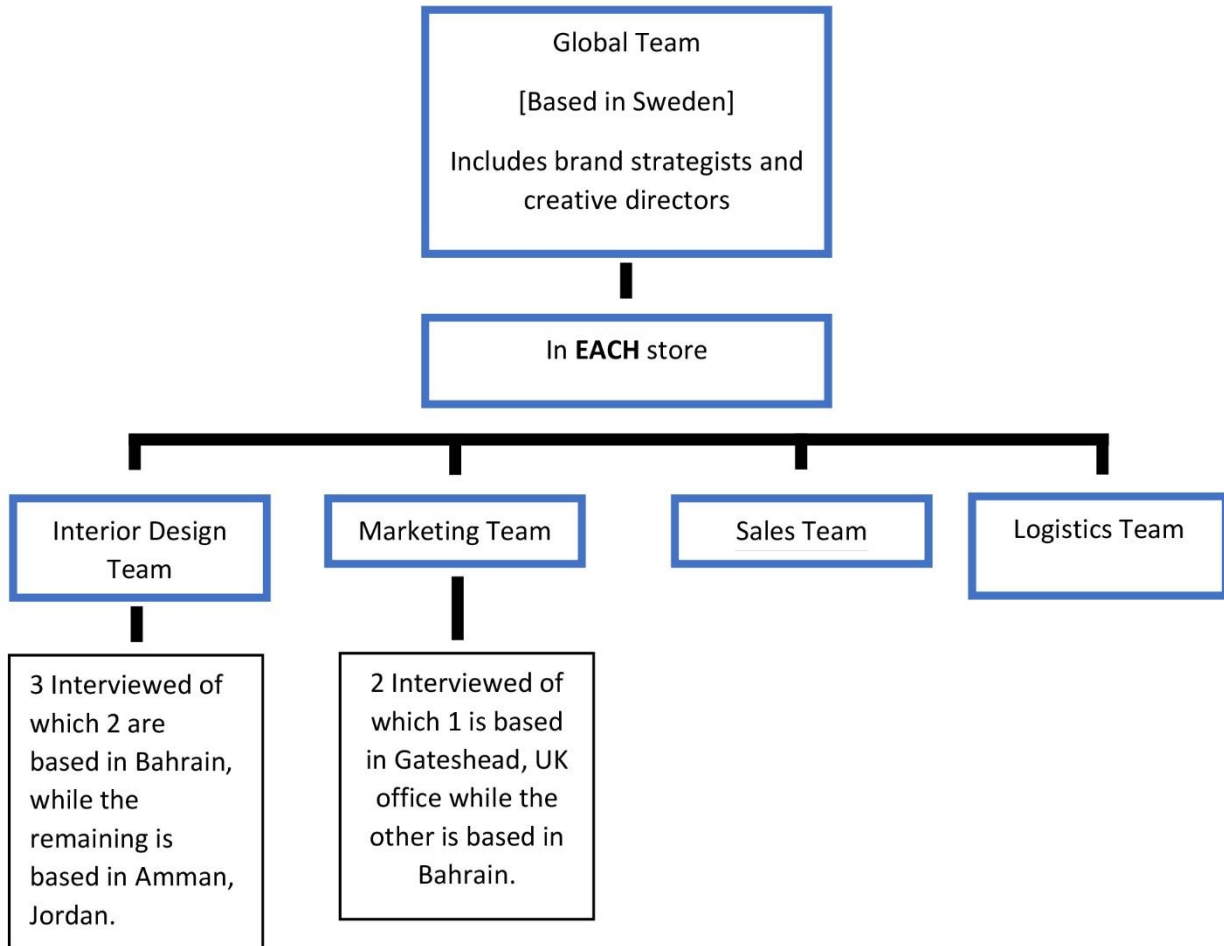


Figure 25: IKEA Participants Overview and Context. Source: Author.

Table 5 IKEA Participant Information

<i>Participant Code</i>	<i>Job Title</i>	<i>Interview Duration</i>	<i>Medium</i>
IKEA			
Marketing Manager	Marketing Manager – IKEA Group, Gateshead, UK	58:32	Face to Face
Interior Design Lead	Interior Design Lead – IKEA Group, Bahrain	40:42	Face to Face
Marketing Specialist	Marketing Specialist – IKEA Group, Bahrain	38:09	Face to Face
Interior Designer	Interior Designer – IKEA Group, Bahrain	23:39	Video Conferencing
Architect/ Interior Designer	Architect/ Interior Designer – IKEA Business, Amman	34:44	Video Conferencing

5.5.3. IKEA Findings

a. IKEA Process Overview

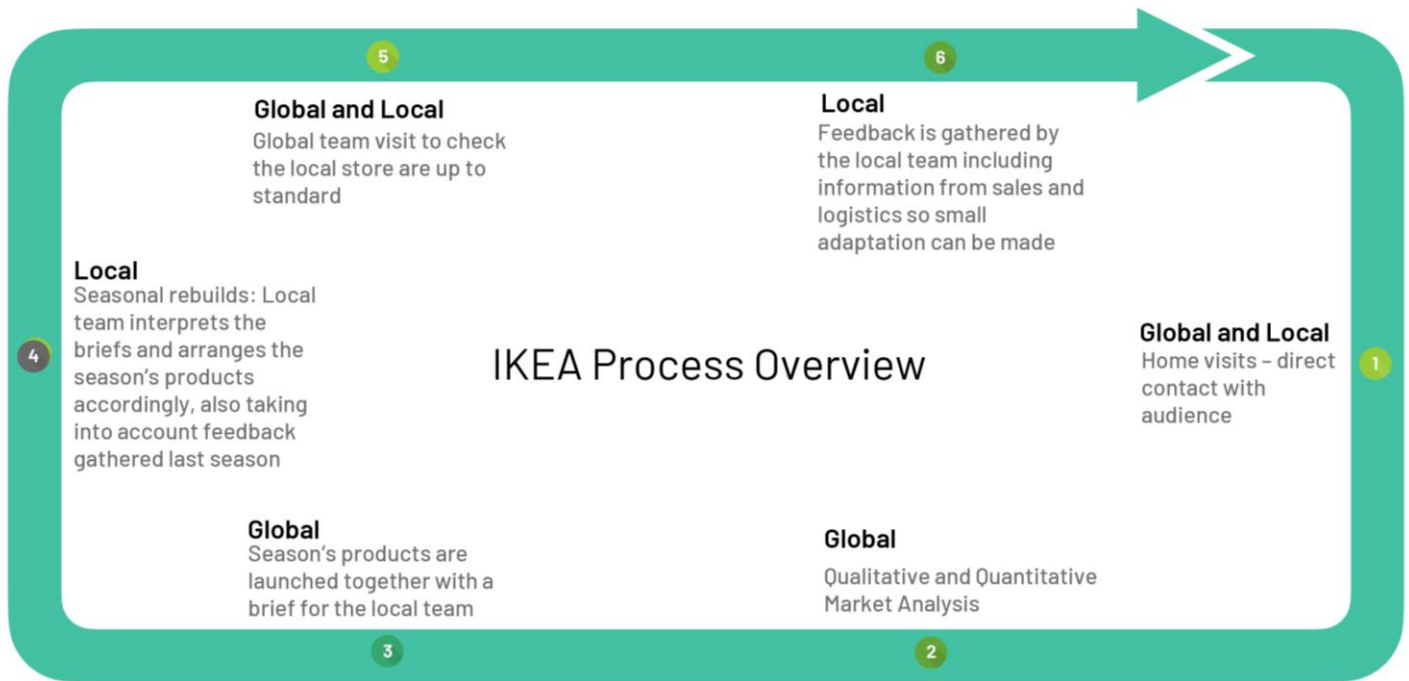


Figure 26: IKEA Spatial Experience Design Localisation Process. Source: Author.

The following diagram (figure 26) illustrates the process that IKEA follows to translate their spatial experiences to different geographic settings and contexts. As can be seen in Figure 19, unlike the Starbucks process, the IKEA process is more of a cycle than a linear process. The process will be referred to throughout the discussion of the IKEA findings and explained further below.

b. Evidence of Localisation

Evidence of the importance of localisation is also evident in the case of IKEA. A participant from IKEA talked about how some aspects that worked in other IKEA stores do not necessarily work in the participant's own geographic context, hence the need to localise:

"I face a lot of people that say in this country we are used to this in another IKEA store – but from a local standpoint it would not work in Bahrain." – Marketing Specialist

Another IKEA participant suggested that localising is important in order to be respectful of other cultures, but at the same time suggested that in order to do so, the brand's identity needed to remain strong:

"You have to respect that people are culturally different and we are going in on that pretence but at the core of it the business idea and everything else is pretty much the same. Our identity is pretty strong and is not under compromise, we are not trying to be different, we are still IKEA, we are still Swedish." – Marketing Manager

c. Design and Distance

IKEA has local designers based in each one of their stores, who can also act as local knowledge contributors to that specific market because of their proximity to it. That is because when visits to local homes are conducted for research purposes, people from the local team are invited and their inputs are taken into consideration. One interviewee said the following about home visits:

"There's one method that they do each year and it is called the home visit, it is where a team of designers and sales staff, randomly choose local homes and visit them. They try to understand how people place their furniture, how people organize, all of the different aspects of IKEA. Of course with the agreement of the people in the house we can take a look inside their storage units see how they organized the stuff. The living room, the kitchen, and all of the aspects taken from the home visits are translated into the upcoming rebuild, or upcoming campaign. The home visits are a very important method that they use that helps understand in reality how people live in their homes in this local market." – Architect/Designer

In addition, even though the design brief is handed to the local design team with a particular demographic in mind, the local design team is left to interpret that brief and arrange it using

both their professional and local knowledge. An example showcasing the use of local knowledge is shown in this participant's answer about seeking inspiration:

"We have that set [the design brief] and from that we get inspirational ideas whether from Pinterest or Google and we also have a page which involves staff from the whole world of IKEA. So we can kind of search in that group and look at inspiration pictures, what people have implemented in their stores around the world and then we go back to our personal houses [their own homes] how people have things around and then we try to see what most houses have." -

Interior Designer

The IKEA process starts and ends with the global team [based in Sweden] selecting a few members of the local team and visiting local homes in that region to specify the market drivers that need a design solution, as seen in the IKEA process diagram in Figure 18 making their process a cycle. The global team designs the new range of IKEA products and gathers inspiration for the backdrop of the spatial experiences, based on the home visits and the data gathered.

The global team then launches that product range with a series of briefs for the local team to interpret in arranging the products. The local team interprets the briefs and arranges the season's products accordingly, considering their own local knowledge, the brief, and the feedback gathered over the previous season. The interior designers interviewed from the IKEA branch spoke about the briefs, noting that they would adapt the spatial experience locally according to the brief, by arranging but also by mimicking popular building materials and settings for backdrop purposes. For instance, one participant noted:

"They reflect the outdoor building materials (limestone for example) usually also in balcony displays, and they also display interior materials that are usually used by locals, such as most common kitchen and bathroom tiles for walls and floors." – Architect/Interior Designer

"We have what we call a work brief for every room. It talks about who is living in that room, is it a girl, is it a guy, living situation, are they living with kids, are they are multigenerational etc. Also it includes a kind of a problem, is it a storage space, is it that people come and sleep over etc. [based on the demographics of that area from the information collected in home visits]" –

Interior Designer

At IKEA, after the final implementation, the global team visits to check that local stores are up to standard and to give the local teams pointers on how to move forward. The local teams, including information from the sales and logistics teams, make small adaptations before the next product range launches. The major adaptation is informed by the home visits that the process started with. On the subject of global visits one participant mentioned:

“They come for something they call the concept visit, once or twice a year. In the concept visit they check how IKEA in Jordan is applying the concept of IKEA.” – Architect/Interior Designer

The global team usually visits IKEA branches around the world once a year to make sure they are following the guidelines and are up to the required standard. The design, sales and marketing managers are usually the members of the teams that meet with the global team more regularly, after taking the teams’ suggestions into account. They usually represent the local team at global meetings.

IKEA is constantly adapting and renewing their spaces. They have seasonal rebuilds where they work on the feedback from previous seasons as well as adaptations throughout the year. There are four launches throughout the year with a general theme from the global team (based in Sweden) and each local design team has to adapt the arrangement of the furniture and the theme based on the geographic context and setting.

5.6. Advancing the Localisation Process

The findings showcased evidence of localising within both Starbucks and IKEA. It also showed that there was a desire to improve how they went about doing this, going beyond what is currently in place. Participants had multiple suggestions about how to further develop their localisation processes and practices.

5.6.1. Starbucks

Most participants suggested the need for something that increases conversations both between team members and between the brand and the clients. One participant suggested that the toolkit should bring the team together and encourage them to discuss cultural issues:

“If there could be a tool - I don’t know in what shape or form -to make conversations about localisation happen I think that would be useful to create our stores in a different way... much

more localised and then it would give us much more empathy for our local counterparts... it is not that we do not have it... but I think it is missing... I think we could even take it further... you know? And I don't know what could that be.” – Store Designer A

Here the participant acknowledged that localisation is practiced, however the participant still thinks that it can be taken further in the Starbucks context. The participant suggested that in order for the toolkit to help create more localised spatial experiences, the tool needs to help the team discuss localisation more often. The participant said making conversations about localisation happen would give them more “empathy” for the local counterparts for whom the localised spatial experience is for.

Another participant from Starbucks mentioned a platform as a toolkit that gives meaningful information about a specific culture. The participant said:

“I think what could be really interesting is having a platform that goes a bit deeper into a local culture and giving an image for an outsider of what is really important for a specific area, and it can be art, or it can be design, or it can be habits trends, dressing, how people treat each other, what is important for them in their daily businesses, in their daily life. I think - though I am not sure - that there are already kind of trend websites – but it would be interesting if it goes deeper than just scratching the surface because then you can be more relevant in your designs and you can connect deeper into the local culture.” – Design Manager

This shows that the design manager interviewed at Starbucks believes that understanding what is really important to a specific area, such as habits and daily interactions, helps create more meaningful localised spatial experiences. The design manager suggests that there might be trend websites offering similar information but the participant does not think they go deep enough.

Based on the same point of trying to understand the basic preferences and habits of a geographic setting or context, Store Designer B from Starbucks also suggested a platform that brings this information to people working from a distance. The participant also suggested that

the platform could have multi-sensory elements, such as visual items, and feature scents that are unique or important to the people living in that specific geographical setting or context. The participant stated:

“Maybe it could be interesting to have an overview of a geographic region. This means if I design a store in Italy for example - I will have a kind of presentation and more solid idea of the country itself. It is like when you search Wikipedia for the country itself you have a text explaining... but what if instead of words it could be a palette with different images to have a colour palette of the country itself... or it could be aromas, it could be a cinnamon stick...” - Store Designer B

This shows that even though the localisation of spatial experiences is practiced within Starbucks, some participants suggest toolkits that increase the number of conversations about localisation as well as understanding the daily habits of the people within geographical settings and contexts to help the design team create more meaningful localised spatial experiences. While once participant just suggested making more conversations around localisation happen, the design manager as well as store designer B suggested what they think the toolkit that would increase conversation could be.

5.6.2. IKEA

Participants from IKEA also had suggestions on what is needed to advance the localisation process they currently have in place.

In general, the need for new types of qualitative tools was the main focus of the suggestions. A participant from IKEA observed that:

“Maybe it is the qualitative side of the tools rather than the quantitative, because the more quantitative you get, international statistics, but actually does anyone give you the quality of the sentiment? So the tools need to be there to tell you the sentiment and what people are thinking and feeling about brand management and experience management. Experience management is not about figures it is about what do I feel as a customer” – Marketing Manager

The marketing manager interviewed at IKEA understands that experiences are intangible and cannot be quantified. Therefore, in order to advance localisation we need to focus on understanding how a customer feels in a localised spatial experience.

Another participant suggested a network that enables people to share information on cross-cultural projects:

“I think maybe a network or... the idea of cross-cultural projects would be very interesting especially since you see a lot of similarities in cultures, so something like a network of creating things together. I think a challenge that we are facing is selling products that might work in one culture more than they do in other cultures.” – Interior Design Lead

The interior design lead that was interviewed at IKEA was interested in more cross-cultural projects with other geographic settings and contexts that are significant to IKEA. Even though IKEA is cross-cultural, the set up of the showroom is localised to the geographic setting, the participant still wanted to learn from other cultures and how they could localise, this would help create more meaningful localised spatial experiences.

Another participant suggested that the solution to developing the localisation process is about listening to customers more carefully, giving the home visits as an example of how that could be done in terms of gathering information for the localisation of spatial experiences. They elaborated:

“So one of the tools is conversation. Listening, and taking a lot of the information in, it is not complex. If I give you an example of home visits it is a simple tool.” – Marketing Manager

Furthermore, another participant said that the brand needs to be communicated more clearly to the consumer in the region the participant was based in. When asked “What are the main challenges that you are facing in terms of the things we discussed, such as context versus brand? What type of support do you need?” the participant replied:

“I think a tool that would improve the conversation between the visitors and the IKEA store. The visitors are always thinking of IKEA as a place that is just standard because IKEA is very different from the other store here. For example clients have to pick up their stuff on their own, of course

there are co-workers to help but the general rule is to have a customer explore. So the customers are always thinking that this way at IKEA as something that is there to annoy them or just to make them follow a specific rule that is provided by IKEA for no reason. So if there is a way to like increase the understanding and the conversations between the clients and the IKEA as a store and as also a concept like why are we doing this. For example we try to explain to them that the products are usually lower in price when compared to the local market because you pick your products by yourself so this way we save. “ - Architect/ Interior designer

The way in which people behave and perceive things varies from one culture to the next. As the Architect/Interior Designer from IKEA suggested, in some cases the concept of the brand and the way in which the spatial experience is organised is part of the brand and must remain unchanged. In IKEA's case it is the do-it-yourself aspect. If this aspect cannot be localised, then the participant suggests that having a conversation with the customers is important for them to understand the importance of keeping this aspect of the brand, rather than localising it.

5.7. Discussion

The aim of investigating these two case studies was to understand how the distribution and processes of GDT informs the localisation of the spatial experience design processes in global brands. Analyses of literature, semi-structured interviews, and observations from stores establish that both of the case study brands acknowledge that localisation is necessary. Looking at the examples of Starbucks and IKEA, it is evident that global companies and brands like these have to make key decisions between teams being in close quarters to one-another or teams being close to the locations they are serving. These are typically economic and resource-driven decisions. The organisations then have to provide tools to help fill the gaps that either choice entails. As seen in Figures 15 and 19, the evidence suggests that both brands generate some ideas remotely in terms of the design of products for IKEA (global team in Sweden) and regional teams working remotely for Starbucks.

The double diamond design process (The Design Council, 2012) as seen in Figure 19, follows the discover, define, develop and deliver order. In order to understand where in the design process

cycle the two brands face issues, Figure 21 outlines both Starbucks' and IKEA's processes in relation to this double diamond design process.

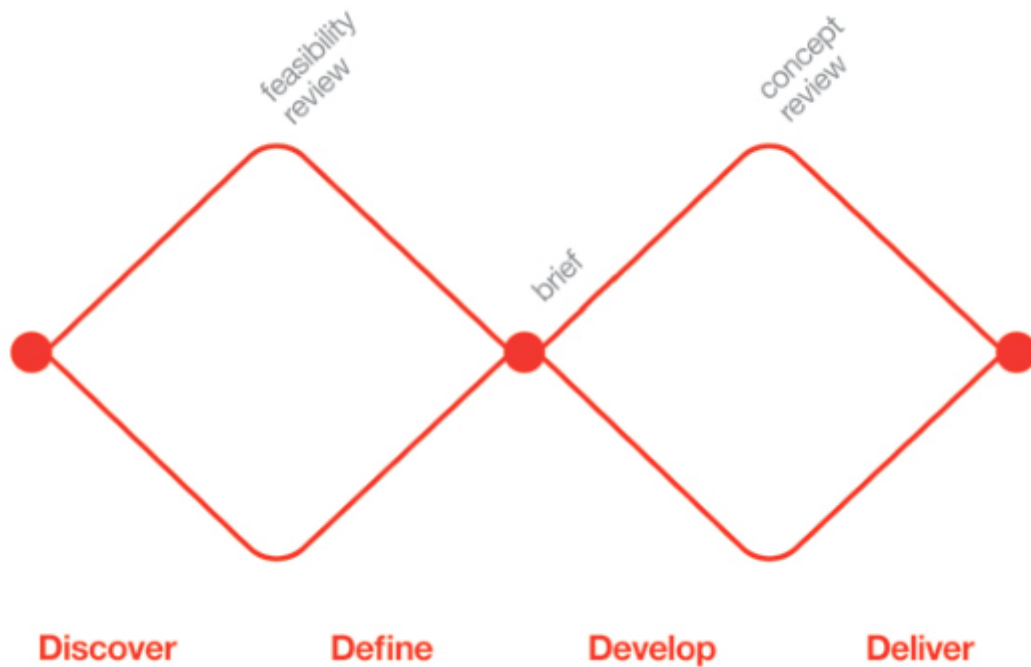


Figure 27: The 4D Model or 'Double Diamond' Design Process Model. Source: The Design Council, 2012.

Most issues addressed by participants at IKEA showed that the challenges associated with localisation are mostly faced in the discovering and defining phases of IKEA's localisation of spatial experience design processes (Figure 27). While at Starbucks, the challenges faced by the participants are mostly in the defining, developing and delivery phases of the design process when localising spatial experiences to different geographic contexts and settings.

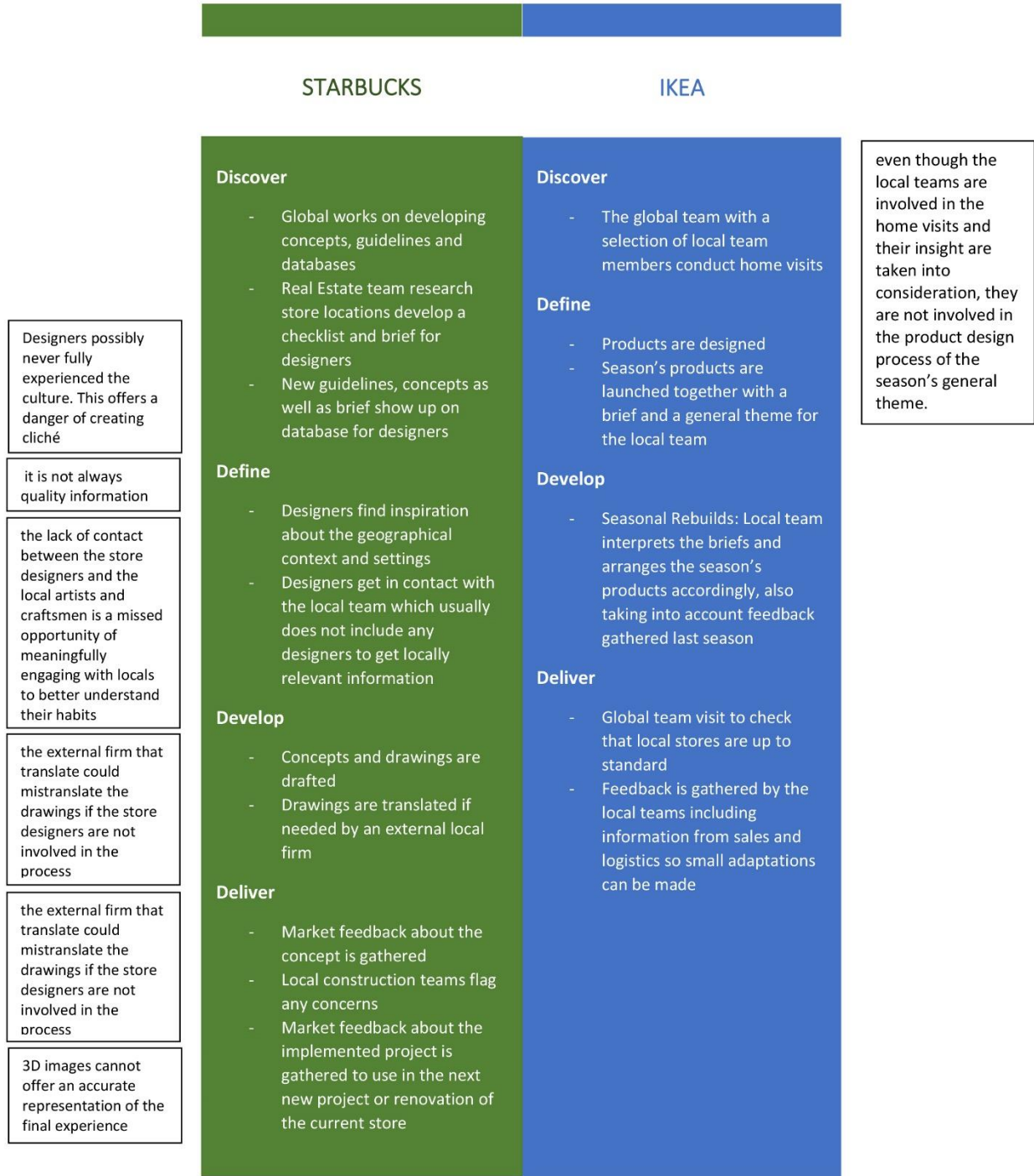


Figure 28: Case Study Brands' Localisation of Spatial Experience Design Process Mapped out According to the Double Diamond Design Process Outlining the Challenges Faced

In IKEA's discover and definition phases of the design process, home visits are done by both global and local teams, the products are designed by the global team, launched by the global team into the different geographic contexts and settings, and the local teams then have to translate the general theme of the seasonal launch into their own geographic setting and context within the experience design. The challenge outlined here is that even though the local teams are involved in the home visits and their insights are taken into consideration, they are not involved in the product design process of the season's general theme. This could be seen as an advantage because it keeps the consistency that is sometimes needed for a global brand, yet this could be a missed opportunity to create cross-cultural designs from the outset instead of just arranging them in relevant ways within the showroom by the local design teams.

At Starbucks, the challenges are faced mostly in the definition, development and delivery phases. In the defining phase, the design is defined by regional teams who may never have fully experienced the culture. As participants suggested, this creates the danger of creating cliché spaces from what the regional designer perceives the geographic setting and context to be, rather than from a meaningful, informed and experienced interpretation. Also, even though the local team is usually consulted to ask about the local culture, as participants mentioned, it is not always quality information because the team does not have any designers. Furthermore language barriers may sometimes make it impossible to communicate effectively. In the development of the design phase, Starbucks store designers use the Starbucks art and furniture catalogue, which means that there is a separate team developing the art and the furniture and contacting the artists and local craftsmen, this gives the store designers more time to work on other aspects. However, the lack of contact between store designers and local artists or craftsmen is a missed opportunity to meaningfully engage with locals to better understand their habits. There is also a risk of the art and furniture not being well integrated into the space because of a lack of designer background knowledge of the items being displayed.

After the drawings are drafted they can be translated by a local firm into the geographic settings and context language if necessary, in order for the local construction team to understand them. This can also cause issues, as the external translation firm might mistranslate the drawings if the store designers are not involved in the process.

Furthermore, in the delivery phase of the design process, the Starbucks designers gather market feedback about the concept by using 3D images and prototypes of the space and running them by a segment of the market from the geographic context or setting. The issue with this part is that no matter how realistic the 3D images are, because of the multisensory and holistic nature of the experience design, the 3D images cannot offer an accurate representation of the final experience.

Finally after the project has been implemented, market feedback about the spatial experience is gathered. However, due to the nature of the stores and the time and effort that goes into constructing them, the feedback does not usually mean any major changes will be made to the same store, at least not for a while. Instead the feedback will be used for another geographic context and setting, which may or not be useful feedback if the setting and context have been modified.

The findings from the case studies build on several schools of theory that were discussed in the literature review from different fields.

One field of thought introduced by Dodworth in the field of interior design is that as interior design continued to be practiced by many outside the profession, an on-going discussion was prompted about the differences between interior decoration, design and architecture. The debate is on-going at the time of writing, and Dodworth (2015) states that it is partly because the distinctions between these aspects of interior design are not absolute. In the book titled "The Fundamentals of Interior Design" Dodworth (2015) tried to define the boundaries of interior design, interior decoration, architecture and interior architecture.

Building on the theories and findings from the points above, the argument is that trying to define the boundaries of these professions is no longer necessary, promoting a more holistic view of spaces. This is because when linked to experience design theories, within interior design, visitors do not experience the architecture, interior and decoration separately from each other, but all of these factors work together and also include other area such as graphic and service design to create the users experience of the space.

However, the case studies showed that this is not a one person's job, therefore, interior design as a title for the team members and professional background is still needed. However, these interior design professionals are now increasingly expected to work within a multi-disciplinary team and know how to correlate. The distinctions are still helpful because one person cannot be in charge of the all of the different professions, however they are also a hinderance if the professional does not have general knowledge outside of the said field to work with others and correlate the same message of the brand.

As regards the localisation of branded spaces in literature, it has been discussed in the literature review that Khan (2018) confirms that to express authenticity, global brands may opt for localised retail store design (retail stores that express the place in which the store is designed) as a form of unique retail design that offers an experience that is rooted in a time and place. Localised retail design differs from conventional modes of retail design in that designers source inspiration from both brand and place (as opposed to brand only).

The need to localise authentically was reconfirmed through both cases as participants were aware of the importance of localising and making sure that the correct perspective was taken into consideration rather than a stereotype of the geographic context and setting. However, when it came to the design process there were some challenges that prevented the global brand teams in implementing authentic localisation to the full potential. For example, imbedding co-creation was seen as one of the strategies used to try to authentically localise, as found previously in literature. However, co-creation was sometimes done stereotypically and not as the literature suggested it should be used. This includes the used of a catalogue with local aspects that designers then just use and allocate to different parts of the space rather than communicating with the local themselves to understand the ideas behind the through and understanding their sensitivities and multi. This is because of the lack of time, language barriers as well as the distribution of the teams in Starbucks being only in certain locations designing for a larger geographic context and setting from a distance. Similar barriers to co-creation were seen in IKEA's process, even though local designers were distributed in each of their locations around the world. However, the designers were not involved in the design of the items, just the rearrangement of the furniture.

When it came to receiving feedback and interacting with locals IKEA had several means of doing so such as home visits and the implementation of the feedback within the store. This is because of where the local designers are located geographically, but also the nature of the brand offerings made it possible as the showrooms have a temporary nature rather than the more permanent nature of the spatial experiences in the case of Starbucks.

Other than co-creation the findings of Chapter 5 shows that experience design boundaries that were researched through literature (co-creation, memory, multi-sensory) etc. influence how authentically localised the retail space is. This was shown where the participants within global brands were aware that they lack in certain areas in the current process such as lack of focus on multi-sensory elements.

Therefore, overall, the findings confirm Khan's view that authentic localisation is important, and that brands take inspiration of both the country of origin of the brand as well as the geographic context and setting of the spatial experience design. The findings also built on the barrier to the implementation of authentic localisation to the best possible outcome. Furthermore, The research evidenced that Hassenzahl's observation that experience has evolved more in academia that in practice is accurate. However, adding to that the research evidenced the challenges are there as a barrier to the implementation of the theories found in academia on the subject of experience design.

J. Rossman and Duerdon add that experiences can be done superficially or inauthentically. They stated that fully positioning an organization for success within the experience economy remains a strategic issue that many executives have difficulty solving. The research evidenced that experiences are done superficially or inauthentically in global brands through the interactions with the participants from different global brand teams. However, adding to that the challenges were discovered.

In terms of building on theories of the movement of "Decolonizing Design" by authors such as Abdulla et al. & Khandwala, Chapter 5 also touched on these schools of thoughts. Abdulla and her group's co-founders have written extensively on the colonial systems within which contemporary design operates.

Now, decolonisation has come to represent a whole host of ideas: It's an acknowledgement that in the West, society has been built upon the colonisation of other nations, that we exist within a system of privilege and oppression, and that a lot of the culture that is seen to be local to specific geographical contexts or settings has actually been appropriated or stolen.

Abdulla et al. (2019) suggest that to date, mainstream design discourse has been dominated by a focus on Anglocentric/Eurocentric ways of seeing, knowing, and acting in the world, with little attention being paid to alternative and marginalised discourses from the non-Anglo-European sphere, or the nature and consequences of design-as-politics today. They add that the work designers make is inspired by taste, and taste is often derived from what we're exposed to during our upbringings. They also add that design values and history is taught through a canon; that accepted pantheon of work by predominantly European and American male designers that sets the basis for what is deemed "good" or "bad."

The top leading global brands are mostly from western developed countries. The two cases that were chosen for the case studies were no different. Building on the theories of decolonizing design mainstream design comes from a system of privilege (Reported on in Chapter 3).

Also, when looking deeper into the cases, the case of Starbucks had two offices located in Western cities (Amsterdam and London) that are in charge of Europe the Middle East and Africa. These designers are meant to understand all of the different sensitivities in localisation and implement them in the stores with limited tools and interaction with the locales due to different challenges such as time and budget issues.

While IKEA had designers in every location that are based in the country itself. Helping enable designers and economies within that geographic context.

The research evidenced that tools are an important part in bringing the new opportunities and overcoming the challenges of experience design. Participants explained the tools that they currently use as part of their design process, and explained how these tools can be furthered and what other kind of tools are needed in order to localise their spatial experiences in a more authentic way in different geographic locations.

Another schools of thought that was built on through Chapter 5's findings is the Hand's theory. Hands suggests that Design always needs to be harmonised and carefully associated with a firm's approach and core capabilities, as Hands (2008) has emphasised; this describes the design manager's job. Hands (2008) specifically identifies three commonly-agreed models for managing design within an organisation. Hands notes that the first is to include an in-house design unit, the second is to employ an external design consultancy on a short-term basis, and the third is a combination of both routes.

The findings of Chapter 5 looked into the perspectives of many different models including in-house and outsourced teams. The research also added a deeper understanding and empirical data specially on the affect of the geographical distribution of in-house design teams through the analysis of the cases of Starbucks and IKEA which was not elaborated on in detail in previous literature.

Therefore, this chapter further elaborated on the literature review and the preliminary interviews in answering the first research question which is 'Within the context of globalisation and localisation, what are the interrelations between brand management and experience design?'. By further elaborating of interlinks found in the literature reviews, confirming the value authentic localisation and evidencing challenges as well as identifying opportunities on which type of toolkits are needed to help with the challenges the findings in this chapter layed the foundation in order to built upon it to answer the second research questions which is 'How could organisations advance their process using creative toolkits for experience designers and brand management teams?'. The findings from the chapter revealed some recommendations into how organisations can advance their process using creative toolkits such as the incorporation of multi-sensory elements.

5.8. Conclusion

The findings are classified in a way that can help other brands learn from global leading pioneers. They also provide initial guidelines for the creation of a creative toolkit that can be built upon in the next method to enhance the synergies between brand managers and experience designers when designing their local spatial experiences. Looking at the Starbucks

and IKEA examples, it is evident that global companies have to choose between the team being in close quarters, and the team being close to the locations they serve, and then develop a creative toolkit to help fill the gaps that either choice entails. Evidence suggests that both brands generate ideas remotely. There is therefore a need to create a framework that the teams could use to be able to holistically immerse themselves in a culture while bearing in mind a range of other concerns including the budgets, timelines, and methods of inspiration.

The case studies have contributed a deeper understanding of how team dynamics influence design processes in terms of localising spatial experiences to help global brands decide how to distribute their team members around the world. Moreover, understanding specific challenges that global teams face when distributing further around the world or more concentrated in certain locations in terms of localising branded spatial experiences can help develop processes, tools and frameworks that enhance the design process within these GDTs.

Chapter 6: Meaningful Engagement with Locals – Validating the Findings from Starbucks and IKEA with Delphi method surveys

This chapter reports on the third stage of data collection and analysis activities conducted for this study - the Delphi surveys conducted with a panel of specialists was split into two categories; outsourced and in-house team members of global brands. The chapter explains in more detail the motivations behind conducting the survey, the participant sample and recruitment process, and how the questions for both stages of the survey were formed. Following this, the majority of the chapter reports on the findings from the survey. The analysis of the survey data highlighted how panellists confirmed the value of localisation and the need to develop affordable, simple suggestions. These suggestions responded to some of the issues teams had around designing interiors for localised contexts, dealing with the issue of design and distance and promoting meaningful interaction with the locals and contexts from a distance. This chapter concludes with a description of the main contributions that this section provides and examines how these findings will be used to develop the next stage of research.

6.1. Why Delphi?

I wanted to validate and confirm my findings from earlier studies. This was seen as important to reassure us that the themes developed in previous findings, would be more suitable for a wider variety of global brands. Both of the companies investigated during our case studies were using an in-house design team structure. As mentioned in the literature review (Chapter 2) there are three different types of design team models; in-house, outsourced, and a combination. Each different design team model has its own advantages and disadvantages in terms of affecting the way a design team operates (Hands, 2008; Nayak et al., 2009; Marion & Frair, 2015; Munsch, 2004).

Therefore, the Delphi method was seen as the most suitable method as this kind of survey takes relatively less time to complete for research participant compared to interviews, and therefore allowed us to approach outsourced teams that would otherwise not have had the time required to participate in a case study. Using this method allowed us to bring together experts within different organizational structures (i.e. in-house and outsourced), to compare issues faced when localising spatial experiences and come to a consensus.

6.2. Delphi Panel Members

The recruitment of the panel followed the process outlined in Section 3.5. The survey respondents were split into two panels to ensure that a variety of opinions be taken into consideration. The two panels were comprised of: 15 participants who were members of different global brands “in-house” design teams; and 11 participants who were members of design teams from organisations who were outsourced by global brands to do their interior design work. The in-house panel members were made up of members working directly within the company, while the outsourced team members are those that moved between brands and that worked with them in the short-term.

Table 6: Delphi method panel information.

<i>In-house</i>	<i>Outsourced</i>
Head of Insight and Design Strategy	Sales and Brand Director
Senior Brand Manager	Brand Strategy Consultant
Head of Internal Communication and Employer Brand	General Manager and Brand Strategist
Creative Design Manager	Director of Architectural Design
<i>Brand Marketing Executive</i>	Associate A
Head of Marketing	Senior Architect A
Brand Manager A	Senior Architect B
Brand Manager B	Assistant Project Manager
<i>Assistant Marketing Manager</i>	Architect

<i>Brand Manager C</i>	Associate B
<i>Graphic Designer</i>	Marketing Associate/ Creative Designer
Visual Merchandise Designer	
Creative Services Manager	
Head of Brand	
Assistant Design Manager	

6.3. Questions

6.3.1. Delphi Stage 1

The first part of the survey was open-ended questions encouraging the panel to express their experiences and opinions on similar topics that were discussed with the case study brands. This was to discern whether any patterns emerged in terms of the issues global brands face when adapting to cultural contexts.

The questions set out to explore these different overall topics: a) Team Structure b) Available Tools c) Challenges d) Suggested Solutions. Some of the questions were similar to those asked in the case study interviews, while others were developed based on the findings. The rationale behind the questions included:

a. Team Structure

The topic of team structure was important to discuss in the Delphi method because as the findings from previous methods suggest, the team structure affected the way in which localisation of spatial experiences was designed. This is because the Starbucks team structure meant regional designers were designing remotely, while in the case of IKEA local designers they were arranging previously-designed products remotely.

Therefore, it was important to understand whether other team structures in various

global brands affect the ways in which the localisation of spatial experiences are designed. Furthermore, the question to address the topic was:

What is a typical team structure that is needed to coordinate translating global brands into local environments? Also, if relevant, discuss what your roles and responsibilities are in the context of the wider brand team.

b. Available Tools, Methods and Techniques

The findings from the case studies discussed in Chapter 5 revealed that both Starbucks and IKEA have specific tools, methods and techniques to tackle the challenges that come with designing localised spatial experiences for various geographic contexts. Starbucks used programs such as the Starbucks Art and Furniture program while IKEA used home visits. Therefore, to understand if other global brand teams use similar or other tools, methods and techniques the question to address the topic was:

Do you use or know of any specific tools, methods or techniques to help develop localised experiences for global brands?

c. Challenges

The preliminary interview and case study findings in Chapter 4 and 5 showed that different global brand design, marketing and management teams face challenges when designing localised spatial experiences such as dealing with the distance from the geographic setting and context to be designed for, finding local inspiration as well as designing meaningful spatial experiences, which people in that geographic setting and context can relate to. Therefore, the question to address the topic was:

Explain the challenges global brands face that need addressing when it comes to managing their brand in more diverse cultural contexts?

d. Suggested Solutions

The preliminary interview and the case study findings also showed that participants had suggestions for new tools, methods and techniques that could help global design, marketing and management teams when translating their global brands, in terms of

spatial experience design into different geographical settings and contexts. To build on the suggestions already gathered, the question to address the topic was:

What type of support do you think is needed?

e. The participants in the preliminary and case study interviews were asked this question and they proposed many potential qualities needed to support teams working to localise spatial experience. Therefore, this question was added in order to get more suggestions to validate the suggestions from previous studies, and add to them.

6.3.2. Delphi Stage 2

The findings from the preliminary interviews (Chapter 4), as well as the case studies of Starbucks and IKEA (Chapter 5), and the findings from the first stage of the Delphi method were used to construct several statements in the second Delphi survey where participants were invited to rate to what extent they agreed or disagreed with the following statements:

Statement 1

1. Global brands do not need to adapt to the cultural traditions of certain nations (e.g., UK) as they do to others (e.g. India).

Rationale

In the case study of Starbucks, it was mentioned that a 2010 article titled 'Global brands, Local tastes' (Khaleeji Times, 2010), made the case that brands such as Starbucks were too standardised (i.e. design is kept the same throughout different countries rather than localised design to the different geographic settings and contexts). Moreover, two failures were mentioned in the case study of IKEA. One failure was that IKEA was refusing to change the sizes of their bed in a certain market and had therefore failed to connect with consumers. While the other mentioned adapting to a market resulting in a highly dispersed range and therefore becoming conflicted, which resulted in failure to be consistent enough for the consumers. These two examples of failure also highlight different extremes. Therefore, I wanted to see if the panel thought that certain markets should not be adapted to while other geographical contexts and settings should be adapted based on these contradicting findings.

Statement 2

2. Global brands do not need to gather feedback from new markets in specific geographic regions to know that local consumers will respond well to the brand.

Rationale

From the case studies of Starbucks and IKEA in Chapter 5, it was apparent that the feedback process in both brands is different. In some cases, knowledge of previous markets seemed to be sufficient. Therefore, I wanted to see if consensus could be reached on whether it is important for each market every time.

Statement 3

3. Brands should allow a selection of consumers to physically experience a brand's new localised spaces and designs and give feedback for the space to be adapted before it is launched.

Rationale

In Chapter 5 the case studies showed that in IKEA because of the nature of the business and the less permanent nature (compared to Starbucks) as IKEA moves furniture and partitions around and showcases the products differently only to localise, they were able to let the visitors physically experience the space and then implement the feedback into plans for the new season. However, because of the more permanent nature of the Starbucks store they were unable to immediately implement the feedback and therefore use it on other stores if that applies, which might not be in the same geographic setting and context.

Statement 4

4. Manuals safeguard the global brand's concept but much flexibility is still needed.

Rationale

The preliminary interview findings in Chapter 4 showed that manuals that safeguard the brand sometimes come to local and regional teams from the global brand's headquarters. The local

and regional teams can then discuss any issues that may contradict or hinder the localisation to the geographical setting or context and address them. In the Marketing Executive A's case, Paris is the central office, so they send the local teams central guidelines to all of the markets including Asia, Europe, Middle East, and Africa etc. It is then the local teams' job to take the guidelines and localise some design aspects based on the brand's environment, culture, and clients.

In Marketing Executive B's case, a lot of human negotiation goes into adapting a brand, and getting authorisation for localisation. This shows that often it is not a clear formal process, but something negotiated on a case-by-case basis. This also shows that some flexibility in decision-making is given to local counterparts, supporting the decolonisation of design.

Statement 5

5. Strong brand values are flexible, and are mainly intangible.

Rationale

This statement was added after reviewing the literature about branding that supported Rodriiguez's (2020) suggestion that a story needs a theme. He suggested that happiness, empowerment, inspiration, etc. are feelings we can all relate to as humans, and if a brand story can strategically drive these themes across its business it will succeed in connecting with its audience. Rodriiguez (2020) suggests that sometimes an experience is as simple as reminding people about your mission and purpose, but it has to be something that's not only relevant but also engaging and compelling (similar vocabulary to Pine and Gilmore's).

However, even though the core meaning might be universal, translating the core meaning into a tangible physical experience, could be miscommunicated, as certain sensory aspects might have different meanings in different cultures.

Statement

6. Taking time such as a few hours to have a workshop to understand how to manage a new locality.

Rationale

Some of the participants from the preliminary interviews (Chapter 4) as well as participants from the case studies (Chapter 5) mentioned that they do not always have enough time to get inspired for a specific geographic context or setting. Therefore, this statement was added to understand how much time they thought was manageable to add to their process.

Statement

7. Finding local inspiration is better done as a group/team activity.

Rationale

In the Starbucks case study findings, participants suggested that they read books or watched movies sometimes to gain inspiration about a specific geographic context or setting. However, it was unclear whether that was done out of individual initiative, or as part of the team and if it was preferable to use such a method.

Statement 8

8. Research by the brand's team about different localities ideally includes smells, sounds and visuals from that region.

Rationale

The findings from both the preliminary interviews and the case study interviews showed that some participants suggested that having access to multi-sensory elements of a specific geographic setting or context would facilitate the localisation of spatial experiences from a distance.

Statement 9

9. Global brands are currently not aware that localising includes not only a focus on visual aspects but also on the multi-sensory.

Rationale

This statement builds on the previous statement, however focuses on whether the panel thinks that global brands are currently implementing the multi-sensory aspects in the brand they work for.

Statement 10

10. Global brands should not change for local markets and local cultural traditions, as people wish to step out of their own world into another, by engaging with a brand.

Rationale

This statement was added because of the advantages associated with globalisation that were derived from literature. It was to explore if the participants are aware of the benefits of standardisation, or if the benefits of localisation are overpowering.

Statement 11

11. It's impossible to adapt a brand for different cultures and traditions without engaging directly with the people that live in these locations.

Rationale

In Chapter 4, participants from the preliminary interviews suggested that no brand could localise without involving the people from that specific geographic setting and context. However, looking deeper into the case of Starbucks, reported on in Chapter 5, revealed that the brand sometimes has little interaction with the local people of a geographic context and setting when designing the spatial experience. Therefore, I wanted to investigate this contradiction by adding this statement for the panel to rate the extent to which they agree or disagree with it.

Statement 12

12. In order to adapt a global brand for different cultures and locations, you need to work intensively and extensively with a panel of representative consumers.

Rationale

This statement builds on the previous statement, emphasising that the interaction has to be intensive and extensive. This is because the Starbucks case study findings reported on in Chapter 5 showed that the store design team interacts with a panel of representative customers for feedback while showing them 3D visualisations of the intended spatial experience, however they only involve them at the end of the process.

Statement 13

13. There is no need to collaborate with local people when adapting a global brand for different cultures and regions.

Rationale

This statement builds on the previous statement encouraging the panels to elaborate on collaborating with locals.

Statement 14

14. It is a global brand's responsibility to engage and improve local designs in the community that they are a part of.

Rationale

This statement was added after reviewing decolonising design literature and realising that when brands like Starbucks (as seen in the case study findings in Chapter 5) employ only regional designers, they are not providing work for the local designers in the geographic setting and context they are designing for and therefore not improving their skills or providing income. However, when companies source local materials for their spatial experiences they help the local economy by encouraging craftsmen and building-up companies.

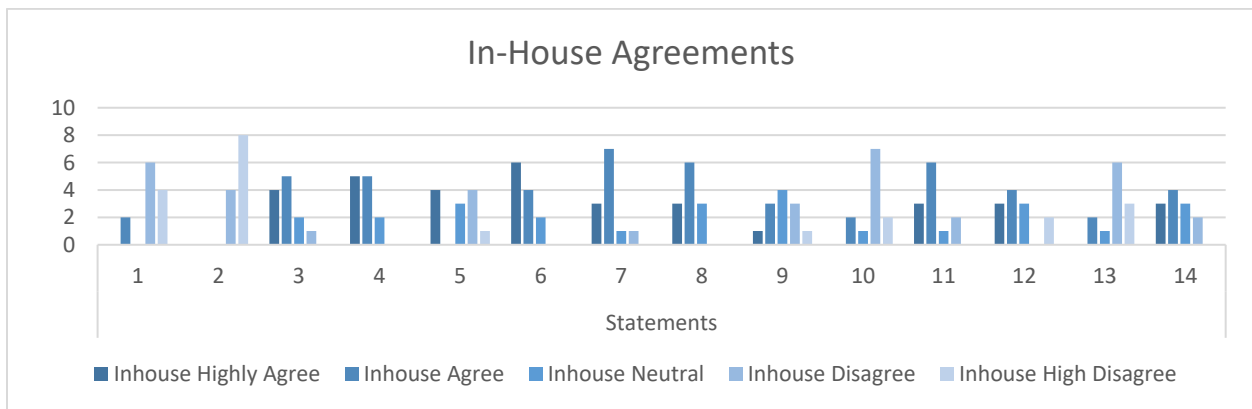
6.4. Findings

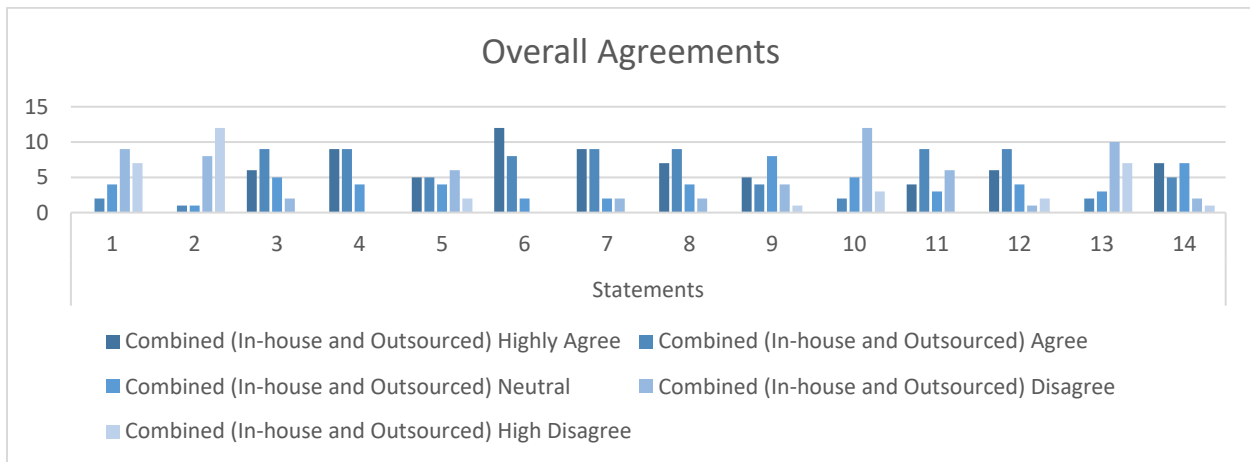
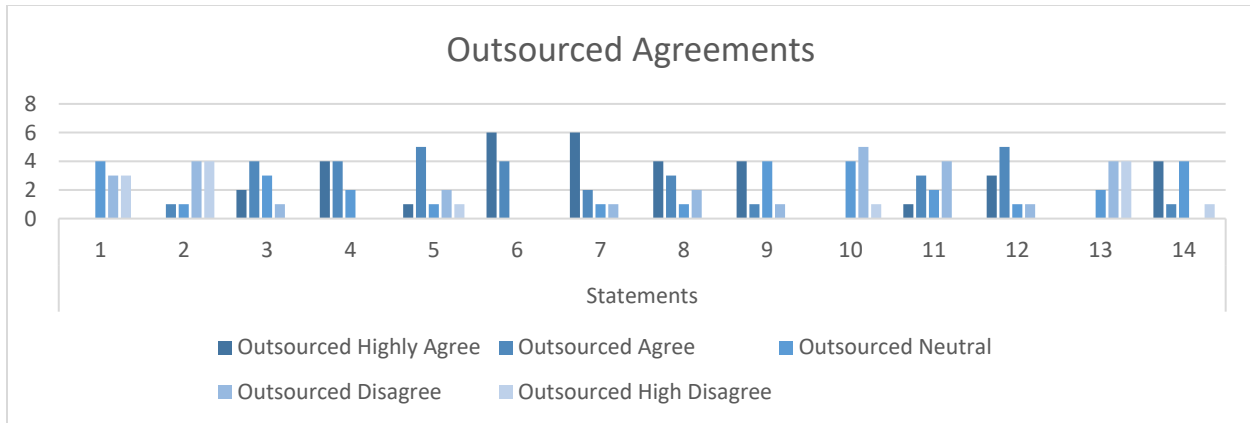
The following findings are from both stages of the Delphi survey. The quantitative data from the second part of the Delphi was plotted in a bar chart in order to find correlations. The percentages of the agreements to each statement were also calculated. Thematic analysis (Clarke & Braun, 2017) was used to analyse the qualitative data obtained in the interviews

(following the steps mentioned in Chapter 3). The qualitative data was gathered from the open-ended questions in the first stage of the Delphi and also from the comments that the panel provided to explain the extent to which they agree with a statement in the second stage of the Delphi. The first theme: "Value of Localising Spatial Experiences" - included the reconfirmation of the importance of localisation for global brands. While the second theme: "Design and Distance" focused on the structure and the distribution of the design team and the challenges faced by the distance, while the third and fourth themes: "Simple, Affordable and Easy to Use" and "Meaningful Engagement with locals and Context" described solutions to the pitfalls of design and distance preferences as per the panellists. As the surveys were done anonymously, the quotations are attributed to the panel to which the participant making them belonged, rather than attributing them to their title or a participant code.

6.4.1. Overview of Agreements

The following charts illustrate the extent to which the panels agreed on each statement. Firstly, the first chart shows the in-house panel agreements, while the second shows the outsourced panellists agreements. As the charts show for most statements, both panels tend to lean towards the same level of agreement and no major differences were seen. The third chart shows the extent of agreement combined for both panels.





6.4.2. Value of Localising Spatial Experiences

Findings from the interviews already confirmed that localisation in relation to spatial experiences is practiced on two successful global brand teams (Starbucks and IKEA). The Delphi survey findings showed similar patterns within additional different global brand teams, reconfirming the value of localisation within spatial experiences.

The panellists from the Delphi survey suggested the value of localisation for spatial experiences within global brands in various ways. One way in which the value of localisation was suggested was how panellists suggested different advantages. One panellist mentioned that localising spatial experiences helps “sell the brand” and “attracts customers”:

“If global brands do not adapt to other cultures then they won’t be able to sell the brand and attract customers, every culture has a different need. You can’t approach the Japanese culture the same way as [you approach] the Arabic culture for example.”- In-house

Other panellists said that it makes the brand more attractive and competitive and also helps the brand stay “on top of their game” adding:

“Adopting local brands to cultural & geographical traditions would make them more attractive and competitive.” – Outsourced

“It might not be a requirement, but we are in an age where customisations and fine-tuning is so important to be on top of your game.” – Outsourced

Moreover, when panellist were asked how much they agreed with the statement: “Global brands should not change for local markets and local cultural traditions, as people wish to step out of their own worlds into another through engagement with a brand” most panellists disagreed (75% of the in-house panel either disagreed or highly disagreed while 60% of the outsourced panel disagreed or highly disagreed) and stated that brands need to localise in every geographic location stores are located, which shows the value of localisation to the panellists. This also shows that not only is localization important in certain area, panellists suggest that it is important all over the world.

The panellists who disagreed corrected the statement, suggesting that the word “change”, in terms of describing what global brands do in different geographical locations, was not appropriate. This panellists preferred words like “adapt”, “cater”, “balance”, “customisation”, “personalisation”, and “hybrid approach”. The panellists explained:

“Global brands should not change entirely but simply adapt certain specific areas in order to capture the interest of the local consumer without losing their key uniqueness.” – In-house

“Global brands have to adapt in order to connect with their new consumers. There should be a balance between adapting to a new culture and still maintaining the brand and originality of the company.” – In-house

“They should not change! Their identity should remain the same but they need to cater to that local market somehow and be sensible to the traditions so as to not create any offensive content.” – In-house

Moreover, the comments on the incorrect use of the word “change” within the previous statement by the panellists, is in line with the previous findings from the literature as well as the case studies. Literature suggests that brands need to strike a balance between sending a coherent message while tailoring to different cultural local customs (Hands, 2008; Holt et al, 2004; Eldemener, 2009; Boutros, 2009). While He and Wang (2017) clarify that global brands will occasionally err on the side of inconsistency in order to better suit a particular locale. Examples of how the balance can be achieved can be seen in the cases of Starbucks and IKEA (see Chapter 5 for more information).

6.4.3. Design and Distance

It has been established in previous findings, especially in the Starbucks and IKEA cases, that the distance between the team members working together within a global brand affects the design process in terms of inspiration, generating ideas and receiving feedback. This theme was further enhanced in the findings of the Delphi survey.

It was established that some global brands have similar strategies in distributing the teams the way Starbucks does, while others prefer the IKEA organisational method. Some of the global brands have regional offices covering EMEA (Europe, Middle East and Africa) much like Starbucks. A panellist suggested:

“The EMEA-based brand manager takes direction from a global counterpart then works with a local territory team such as the UK or France to localise. The EMEA brand manager is the owner of the campaign, aligning and approving work that is conducted with a marketing agency (in partnership with the territory team) with functions such as communication, design and media.”-

In-house

In IKEA, local designers are based in each of the stores giving local insights into that specific market, while at Starbucks the designers are located regionally and not locally. Moreover, even though IKEA and Starbucks disperse their designers differently, they are still considered in-house members as part of the company. Through Delphi, a new type of team distribution was determined where global brands employ permanent local third party companies to gain insights into the region. These third party members work for several global brands; however they have

a long-term relationship with them as their representatives in their local market. A third party member for a global brand explained:

“As a local third party company, they provide the global brand with expertise to enter the region to help. This includes tailoring all marketing strategies, e-commerce strategies, distribution, trade activities and product and service offerings.”

This means that they are a separate company however they work with the same brands more than once, rather than moving from one brand to another, the way the outsourced agencies do. This creates new dynamics for design and distance as rather than filling in the local knowledge gaps with travel for regionally-distributed global brands, Furthermore, some brands choose to employ a third party company to gain such insights. As seen in previous findings, Starbucks struggled to obtain reliable information from their local teams because they did not include designers, however in this case the third party organisation includes designers and marketers.

Moreover, some outsourced panellists believe that the key to enhancing the localisation of spatial experiences when it comes to global brands is choosing the right people to ask for local insights. An outsourced GM and Brand Strategist suggested that in order for global brands to enhance localisation, they need to partner with the right agency that has enough local knowledge. Furthermore, an outsourced director in architectural design suggested that identifying a suitable local partner is the key to success to enhance the localisation of spatial experiences. This shows that when distance is a factor for global brands, these panellists suggest local knowledge through regional agencies or partners to better understand the area and localise it successfully and appropriately. An outsourced senior architect suggested similarly: a close collaboration between the brand and a design company from that geographic location.

Some panellists suggested partnering with the right local agency and employing local people as the answer to gaining insightful information when designing from a distance, yet other panellists thought that using the same employees and having them travel (much like Starbucks) is what can help offer insights into a particular geographic context. One panellist suggested:

“Our global trends team gather intel from their own travel research as well as reports from outsourced agencies.” – Creative Design Manager (in-house)

6.4.4. Affordable and Easy to Use

Many panellists suggested that the most efficient tools, methods and techniques are those that employ the right people with the right knowledge, build good relationships, or communicate efficiently both within the team and with people for the different geographic settings and contexts that are going to use the spaces.

An in-house brand manager suggested that no tools, methods or techniques have really been successful in tackling the issue of localising spatial experiences, because more knowledgeable team members are needed more than anything else. The panellist stated:

“My viewpoint is that none of them (tools, methods and techniques) have asserted themselves as best practice because ultimately it comes down to people doing the work. The support needed in business is the ability to freely travel and work from different locations in order to partner and get work done.” – Brand Manager A (in-house)

Following the same patterns of establishing good relationships and exchanging conversations as a way of enhancing localisation, an in-house head of brand as well as an outsourced architect from the panel highlighted the importance of interaction:

“Build a good relationship with the regional teams, listen to their challenges, visit them in person, and get to know them, if not possible have a conference call, a lot can be done by reaching out and showing an interest and a desire to help. From my previous answer, I'd say 100% don't lose the human touch. Start the conversation with the teams, get over there, run sessions, benchmark competitors, bring in other knowledge experts, reassure [them] that not everything can be solved immediately or through design, build trust and demonstrate a desire to learn and a willingness to improve and it will go a long way.” - Head of Brand (in-house)

Additionally, some panellists suggested that communication with people from the different geographic locations is what is needed. One panellist suggested a portal through which they can communicate with people in different geographic settings and contexts where they act as

representatives of that given location, updating the information that should be considered when designing, and being contacted by the different brands when needed.

“A portal is definitely a great idea, that could be a place where all brands can have a membership in, and there are people from all around the world, representing their culture and suggesting different ideas that could be reviewed by the brands and considered and then put into their geographic guidelines wherever it applies. A global collaboration portal will definitely give a sense of awareness and will improve interaction between the brand and their users.” –

Architect (Outsourced)

When asked to what extent they agreed with the statement “Finding local inspiration is better done as a group/team activity” one panellist answered saying that it is better done with local people and agencies rather than individually.

“Local inspiration, with local people, local agencies. Get out and find stuff, people, trends, emotions.” – In-house

Furthermore, panellists had conflicting opinions when it came to whether a workshop is sufficient to enhance localisation within the teams. However, the answers showed that global team members preferred easy-to-arrange methods. Those that were for workshops agreed they are useful because they are easy to organise. They suggested:

“Workshops are great because they are relatively easy to organise and the results that come from the brainstorming and discussion can potentially be valuable. A few hours is not a huge amount of time, so it would not affect normal business. It gives the opportunity to take a step back from the day-to-day and get in touch with what's really happening locally. Give a better perspective.” – In-house

Others disagreed with using workshops because they said workshops took time. They suggested:

“Not always easy to get arranged at an early stage, this can also be a market visit with a local broker, architect or business owner. But I agree, research is needed. A work shop with local stakeholders is one of many options.” – In-house

“It depends on the workload.” – In-house

Others were worried about the budget:

“Ideally you see and learn more with a group of different people. Usually the cost of getting more people into a market puts pressure on the budget.” – In-house

6.4.5. Meaningful Engagement with Locals and Context

When panellists were asked whether it is possible to adapt a brand for different cultures and traditions without engaging directly with the people that live in these locations, there were some conflicting answers. 16.67% of the in-house panel disagreed, while 40% of the outsourced panel also disagreed. Most agreed that engagement with locals is needed but it is needed and it is not impossible to localise without contact, while others believed that relying on already-available market research is more efficient, unless the brand is branching out to an area where limited information is available. Some believed that engagement with locals is the ideal option if budget and time permit; however it is not the only way to localise. Panellists answered:

“Tricky question. I think I can only answer by saying if you have the budget and remit internally to run an immersion project pre-concept, then it's worth it. If budgets can't be found, then it's possible to create an approach with other means” – In-house

“It wouldn't be impossible as such, but extremely difficult yes.” – In-house

“Ideally Yes, always better to directly engage, but even then, when will you be ready, how much time do you need?” – In-house

“It is possible, but it will not be as effective as it should be, and they're always be a degree of risk.” – Outsourced

While those who agreed explained:

“Global marketing, strategies, definition, and issues should be geared towards maintaining a consistent and strong brand culture, while creating a market as if there were no borders. The most effective way to do so would be to engage directly with locals as the data available is still quite limited depending on the country. The growth of digital platforms and the Internet mean

that brands cannot always adopt different strategies [for each] country and may have to remain more or less unified. However, adapting the brand can be done with the proper research and reach. This will be done much better with the inclusion of engagement with locals directly. Individuality today is important to consumers, across all cultures.” - Outsourced

“I would agree that brands would struggle to adapt to local cultures and traditions without the very people who live and breathe within that community. HSBC is creating advertising that plays on the local knowledge and idiosyncrasies of specific countries around the world in the belief that being able to have a deeper understanding of these local traditions will in some way help communicate and strengthen their brand within this region and it's people. ” – In-house

The panellists who disagreed said:

“A lot of research is now available on all cultures and markets. ” – In-house

“I think there are ways without directly engaging, there is information available and there are always people that have experience with local culture and can transfer that knowledge. Adapting a brand to local culture, tradition will always be on a higher level. Going too deep will create also a sort of confusion to the customer group” – In-house

While most panellists agreed that engaging with locals is beneficial, some do not think it is necessary. However, they would prefer to engage with locals if time and budget permit. However, a small percentage of them did not think it is necessary at all, reasons being that there is enough market research available, as mentioned by panellists in the comments section of the second part of the Delphi.

Panellists showed interest in engaging with locals in a meaningful way in other aspects of the Delphi survey as well. One panellist suggested going deeper than just the surface and understanding who the audience is in detail. The panellist even suggested multi “languages” to address the different audience in one context rather than generalising one local idea. The panellist elaborated:

“Most countries have different ethnic groups living [within them], each with his own culture, way of life and traditions. Talking to all of them in one language (visually or verbally) will be a

huge mistake. A brand should use different communication styles, insights and language to approach different audiences.” – Sales and Brand Director (Outsourced)

Another panellist showed an interest in engagement with locals, talking about the risks of not resonating with customers otherwise saying:

“New market entry is always a challenge that requires careful planning and investment to ensure entry into the new market is the least risk-averse as possible. Part of the planning process is to thoroughly understand the local landscape, this is important because knowing the local market and local consumers will inform what the brand needs to do or not do (avoid). Market research is always valuable. Brands cannot assume that consumers will automatically respond well to the brand. Even global brands like Starbucks, McDonalds, Coca Cola, etc. have adapted their approach when operating in different markets because they realise consumers are not the same everywhere. Some brands have entered new markets but have not been able to resonate with consumers from the get go, for example: Airbnb's entry into China. Consumers did not initially respond to the brand because it didn't fit the consumer culture in the local region. This is why 'Glocalisation' strategies are vital.” – In-house

Moreover, along the same message of gathering meaningful local information, another panellist added:

“Without credible local market research, global brands will fail in their actions to succeed when competing with other brands that are in tune with the local consumers of that region. Regional traditions differ so much across the globe, therefore brands need to adapt their relationship to reflect these differences and demonstrate how they can connect in a more engaging way.” – In-house

Most panellists agreed that engaging meaningfully requires an investigation of the multisensory in relation to the local context. When the panellists' were asked to what extent they agreed with the following statement “Research by the brand’s team about different localities ideally includes smells, sounds and visuals of that area” no one from the in-house panel disagreed. Only 20% of the outsourced panellists disagreed, and the majority of both panels agreed. This

shows that not only is meaningful engagement with locals and context vital, but so is considering the multisensory elements of that locale and context.

6.5. Discussion

Many of the theories found in literature were again built upon with the findings in Chapter 6.

For examples Teufel & Zimmerman (2015), plead for a new generation of retail designers who approach the design process in a holistic way. They suggest that this multi-disciplinary field needs to be better understood and more interconnected through disciplines, with methods and tools to enable better communication across designers and organisations.

By looking into the subject of localisation of global brands spatial experiences from a holistic perspective rather than as an interior only, having it include elements of experience design such as multi-sensory understanding, co-creation and memory, this further the plead of Teufel and Zimmerman.

Also, building of Dodsworth distinctions between interior design, , the argument is that trying to define the boundaries of these professions is no longer necessary, promoting a more holistic view of spaces. That can again be seen like Chapter 5 in the roles that the global brand teams members have such as architects, designers, brand managers and the need for a multi-disciplinary team. However, the multidisciplinary team still need people with thesis individual roles they need to however work together to create a holistic approach.

Furthermore, the importance of tools also resurfaces in the findings of the Delphi survey. Tools are an important part in bringing the new opportunities and overcoming the challenges of experience design. Participants explained the tools that they currently use as part of their design process, and explained how these tools can be furthered and what other kind of tools are needed in order to localise their spatial experiences in a more authentic way in different geographic locations. The ingredients to make a successful toolkit were further elaborated on in this chapter, including evidencing challenges to implementing authentically localised spatial experience design spaces across different geographic contexts and settings.

This chapter's findings also looked further adding to Chapter 5's findings into the perspectives of many different models including in-house and outsourced teams introduced by Hands. The Delphi survey which required a Delphi panel were also split into two categories based on Hands categories – in-house and outsourced (reported on in Chapter 6). Although there was no major differences in the challenges faced when it came to localizing spatial experience to different geographic contexts, Hands categories ensures taking all perspectives into consideration and adding a further layer of validation to the data gathered in Chapter 5.

Therefore, much like the findings in Chapter 5 this chapter's findings further elaborated on the literature review, the preliminary interviews and the case studies in answering the first research question which is 'Within the context of globalisation and localisation, what are the interrelations between brand management and experience design?'. The findings in this chapter also added a layer of validation to the the foundation that Chapter 5 provided in order to built upon it to answer the second research questions which is 'How could organisations advance their process using creative toolkits for experience designers and brand management teams?'. The findings from the chapter revealed some recommendations into how organisations can advance their process using creative toolkits such as the need for affordable, easy to use toolkits that provide meaningful engagement with locals from a distance.

6.6. Conclusion

The aim of this chapter was to add a further layer of validation to the case study findings. The Delphi method chosen ensures the selection of expert panellists to reach consensus on areas that were still under speculation. The findings confirmed that other global brands also find localisation valuable. The findings also showed that other global brands with other ways of distributing designers around the world also faced issues of design and distance, and therefore much like Starbucks and IKEA, they need develop tools to help fill the gaps that result from their choices. This study provides insights into the requirements of the possible solutions to problems that arise from design and distance. This includes the need to find affordable, simple, easy-to-use solutions that promote meaningful engagement with locals and context and include an understanding of the multi-sensory aspects of a locale from a distance.

Chapter 7: Creative Localisation Toolkits

This chapter reports on the creative toolkits developed that built on the findings of the previous studies in this thesis. The chapter first explains the findings thus far, in order to understand what led to the development of the creative toolkits. Then the development of the creative toolkits is outlined leading to the explanation of the final creative toolkits. The explanations describe every part of the creative toolkits and what it would be like to use one. After the creative toolkits were developed, they were tested in a series of workshops in the hands of interior design students at Ahlia University, Bahrain. The next part of the chapter therefore explains how the creative toolkits were tailored to the contexts that this specific case addresses, who the participants in the workshops were, how the data was analysed, and then reports on the findings of the workshops. The chapter concludes with a description of this last section's main contributions.

7.1. Insights thus far

All of the findings from the previous chapters confirmed that marketers, managers and designers within global brand teams are practicing localisation. However, some challenges and suggestions to solutions for those challenges were suggested.

In the first set of preliminary interviews, the balance between expertise and diversity within teams was seen as a struggle. It was important to find members with multidisciplinary design and skill backgrounds in order to apply spatial experience design in a holistic manner, which sometimes overrides the importance of creating a team with different cultural backgrounds to localise those experiences. Getting both the disciplines needed and a variety of cultural backgrounds is a challenge, therefore most choose one over the other, which was usually expertise and skills rather than a variety of cultural backgrounds. One participant within the preliminary interviews mentioned that the brand managers give different teams located in different geographic settings and contexts a report that highlights all of the important aspects about the particular geographic setting and context they are based in. This makes up for the lack of cultural diversity and understanding in the team. Another participant from the interviews at the preliminary stages mentioned that it is important to have basic background knowledge about a geographic setting and context in order to localise for it. However, that is not always the case, as the case studies showed that globally-distributed teams design from a

distance and do not always have basic knowledge about the geographic context and setting that they are designing for. Similarly another preliminary-stage participant mentioned the difficulty of trying to get this basic cultural background information by desktop research from the information available on the internet and other readily-available sources, which is in the cases where the organisation does not provide the design team with a report stating the cultural specifics. While several participants also mentioned the importance of visiting the place in order to immerse all senses in the context in which the design will be set in terms of the geographic setting, however this is not always possible. To deal with the sacrifice of expertise over diversity, as well as the need to understand basic information about the culture, and the inability to travel sometimes, one participant from the preliminary interviews mentioned a multi-sensory way of delivering the basic cultural information to teams authentically, so that it is a package that can be delivered to those designing for a geographic context or setting they are not familiar with.

Similar issues were seen in terms of localising spatial experiences when conducting the interviews for two specific successful global brand cases – Starbucks and IKEA. It was shown that while Starbucks spatial design team members did practice localisation, most of those interviewees felt like it could be further embedded into team culture. In the Starbucks case, the way in which the teams were geographically located in only four main locations around the world, affected the design team members' cultural understandings. Travel to locations to gather insights and inspiration was again mentioned as an opportunity, but one that had barriers. When travel is possible for only one member of the design team, the person traveling will bring items from the geographic setting back to share with the team. If travel is not possible the design team within Starbucks would read books or watch films to absorb the culture before designing, which again proved to be a challenge, as the information needed is not always readily available, and also lacks a multi-sensory understanding.

Moreover, when conducting the case studies of Starbucks and IKEA, secondary research revealed that there is a variety of ways to localise spatial experience design. However, when interviewing members of the teams from both brands, the general process that the team members had to work with did not encourage the use of a variety of methods. For example, the

use of collaborations with local artists was encouraged and embedded within the Starbucks process, such as the use of the 'Starbucks Art Program'. However, this is not the only way to localise spaces, even though it is a way that has been embedded, it is only one way and using it exclusively can cause repetitiveness. As research revealed the use of local materials, collaborating with local designers, and ways other than art can be used as well. In several stores Starbucks has engaged in other ways than collaborating with artists to localise; however they seem to be the flagship stores only or special case stores. As one of the interviewees elaborated, most store designs are not treated with the same importance as flagship stores. Therefore, having only one way of localising embedded within the process could lead the regular stores to include a monotonous way in which localisation of spatial experiences is done and, therefore veer towards the same issues global brands face when standardising.

In terms of the interviews with IKEA team members, it was shown that they already use multi-sensory research by conducting home-visits to a variety of houses in a geographic context and setting to get their information. However, there is a lack of structure that was shared about how these visits are constructed, and how important information is multi-sensory information is extracted from these visits. The suggestions from those interviewed in the case of IKEA suggested a need to focus on a qualitative tools to enhance the localisation of spatial experience. One suggestion was to cross-collaborate with other cultures through a network, to learn from other designers that localised and worked together.

Furthermore, the Delphi survey also confirmed that global brands find value in localisation, with similar issues in terms of designing from a distance. The Delphi survey revealed that if there was a toolkit to be developed to help in the localisation of spatial experiences it needs to be affordable and easy to use. An outsourced architect working with global brands suggested that a portal would be a great toolkit. This suggestion included different people representing their cultures around the world, and brand teams would be able to ask them questions through that portal. Another characteristic of the toolkit provided by the Delphi survey is that it needs to promote meaningful engagement with locals and context. This was found in several suggestions made by Delphi panellists including suggesting a "deeper understanding" of

geographic context and settings. Finally, most panellists agreed that ‘engaging meaningfully’ requires an investigation of the multisensory in relation to the local context.

The findings thus far confirm that there is value in localising spatial experience design. The findings also confirm that the processes currently in place need improvement. The Delphi survey confirmed those findings and added consensus on the need for a creative toolkit to help localise spatial experience design. The Delphi survey also offered insight into what the characteristics of this creative toolkit should be (namely: ease-of-use, affordable, and multisensory) to promote meaningful engagement with locals and contexts.

7.2. Cross-cultural design and creative toolkits

Experience design is a user-centred and interdisciplinary process, through which designers need applicable and feasible methods, tools and criteria (Michailidou et al., 2014). This section outlines the available literature on cross-cultural design and creative toolkits. It outlines why a creative toolkit was the appropriate choice for the challenges found in the management of localised spatial experience within global brands. The section also discusses the elements needed to create a creative toolkit based on the literature.

Sanders and Stappers (2013) discussed methods and tools in the context of experience design and co-creative design. They explain how toolkits are needed in the generative phase of the design process (Figure 29). This is especially the case when co-designing and involving the users in the creative process, which closely correlates with the other findings from different authors who stated that co-creation is an important part of experience design. It also correlates with the findings from the interview and Delphi surveys, which showed that co-creation is welcomed in global brand teams’ processes. Therefore, since the findings thus far revealed that the main challenges in findings out basic multi-sensory information about the geographic context and setting of the users is the main challenge in the generative phase of the design, toolkits are the most appropriate method of dealing with these challenges. The other major challenge that was apparent through the case studies is the routine that the localisation of spatial experience design processes poses encourages a limited variety of ways to localise. This is also an issue in the generative phase of the design process.

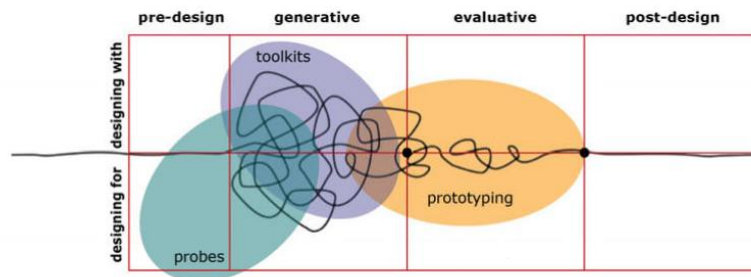


Figure 29: Toolkits in the Generative Phase of the Design Process. Source: Sanders and Stappers 2013.

The generative part of the design process is also early in the design phase. The early phases of the design process are characterised by the mix of research, analysis and idea generation. Recent developments in industry have put extra emphasis on this phase. During the early phase, changes to a design can still be made at moderate expense. Therefore, efficient toolkits at the generative stage could offer global brands a competitive advantage.

To define a creative toolkit, Sanders and Stappers' book "*Convivial Toolbox*" offers a clear explanation. They refer to Illich's definition to further explain the term. First Illich refers to the definition of tools in general, referring to them as "all rational designer devices including hardware, machines, procedures, productive institutions such as factories that produce tangible commodities like electric current, and productive systems for intangible commodities such as those which produce 'education', 'health', 'knowledge' or 'decisions'." Therefore, tools are the man-made consequences of design and development processes. Illich defines 'convivial tools' as those tools "which give each person who uses them the greatest opportunity to enrich the environment with the fruits of his or her vision."

Even though Illich's book was published in 1975, where he referred to the need for tools in design, Sanders and Stappers (2012) explain that tools have again become important for many factors including limited resources, the recession, interest in creativity, new information, and the realisation of experiences, which shows that Sanders and Stappers acknowledge the relationship of co-creation, experience design and the changes in business and design owing to these concepts. Therefore, the development of a convivial toolkit would be the best option as it

correlates with the literature and findings, the only additional concept would be localisation, which has not been explored in their work but is very related.

Sanders and Stappers (2013) talk about ingredients to make toolkits for co-creation that could be useful when developing the toolkit for this study. First, they explain the use of trigger sets (Figure 30). The trigger sets include photos, words, symbolic shapes and more. The authors then explain that backgrounds and backdrops can be used to make toolkits. Those backdrops or ground planes are usually provided to make the activity. The backdrop may be blank or it may carry a suggestive structure to guide or focus the participants' efforts. Those triggers, together with a background and supplies (i.e. scissors, coloured markers, glue or tape) form a toolkit, which is administered according to specific instructions.



Figure 30: Toolbox triggers. Source: Sander and Stappers 2013.

Sander and Stappers also explained that toolkits vary in composition, and participants vary greatly in how they will want to use the toolkits, this is important to keep in mind especially because findings in the Delphi survey encouraged participants to not lose the “human touch”. Having flexibility would encourage the team members to add their own personal touch by not determining the outcome specifically but only influencing it positively.

Even though Sander and Stappers explain design toolkits in detail, still only a few methods and tools supporting designers in systematically understanding, creating and evaluating user experience can be found, and there are even fewer on cross-cultural design.

Some authors also approached the subjects of tools within cross-cultural designs. Some of which offer insight into the variety of ways toolkits can be approached. However, none of them focus on the challenges that were seen to be the issue within this study; mainly the need for a holistic multisensory meaningful understanding of the basic local elements of a geographic context and setting from a distance.

One researcher who has approached the development of tools for the design process in general is experiential design researcher Jane Fultron Suri. She developed techniques and tools that are now widely used. She sought to increase the accessibility of human-centred tools, co-authoring and publishing IDEO's method cards, and creating 'thoughtless acts?' — a collection of snapshots that depict the creative ways in which people interact with the world. Both toolkits include some of the trigger sets that Sander and Stappers talk about.

There exist many cross-cultural tools for the field of human/computer interaction. They offer insight into the usefulness of toolkits in different design areas, but they are not designed with spatial experience design in mind. While in relation to cross-cultural and user-centred approaches within global organizations a paper titled "*Cross-Cultural and User-Centred Design Thinking in a Global Organization: A Collaborative Case Analysis*" sheds light on the design process for a co-creation, cross-cultural design, design thinking within organizations, and design tools and materials, each of which stem from particulars in the case, but at the same time serve as hints of developments taking place in the design field more broadly.

The team in the Abildgaard & Christensen (2017) case study talk about the process of designing accessories for a global automotive organization. However, this specific case is unlike the case studies that were studied, as the teams are able to travel and include cultural translators as team members, therefore the tools suggested by this study are very basic such as sticky notes, used to write key words and ideas while the teams are working together. These tools do not

qualify as creative tools as they do not include triggers or a background, as suggested by Sanders and Stappers.

Current toolkits also make considerable use of the visual modality. Sound, touch, and smell are known to be powerful at eliciting memories and associations. According to the previous studies discussed in Chapters 4-6, toolkits for this type of design would really help global brands design their localised spatial experiences more meaningfully.

7.3 Creative toolkits

Two creative toolkits were developed based on the available literature on cross-cultural design and creative toolkits, as well as the findings thus far. The aim of the toolkits was to advance the process of localisation for multidisciplinary design teams working on spatial projects. The toolkits needed to be simple, affordable, and easy-to-use ways of meaningfully engaging with different local contexts. They also needed to include an understanding of the multi-sensory aspects of a culture from a distance. Both creative toolkits can be used separately or together, but for better results it is recommended that they be used together.

Creative Toolkit 1: Spatial Localisation Prompts Cards

Development of Creative Toolkit 1

The first creative toolkit that was developed aimed to address the scarcity of ways to localise that is being practiced in some of the global brands' spatial experiences.

One of the areas of improvement that was seen in Starbucks' localisation of spatial experiences process was having a rigid process in certain areas rather than being flexible to save time, however this meant that the localisation part is not being done authentically, or is repeated in similar methods in different geographic settings instead of it being unique to that specific geographic setting or context.

I started by creating a list of global brands, and searching publicly available resources and reports about their brand guidelines and design processes to identify examples of localisation. In doing this, I endeavoured to generate a list of strategies and techniques that appear to be used by companies to support the localisation of a brand. The intention was for these to be the

starting point for a creative toolkit that had a set of prompts that designers can use as part of a creative design process.

The companies selected for the analysis for the first creative toolkit development were McDonalds, Starbucks, Apple, Adidas and Aesop. A few possible global brands were outlined at the beginning by looking at brand leader boards. Global brand leader boards identified McDonalds, Starbucks, Apple and Adidas (all of the brands selected with the exception of Aesop) as constantly being at the top (Visual Capitalist, 2020; Interbrand, 2020; Ranking the Brands, 2020), they were also identified as brands with physical stores that localise, making them viable potential case studies for this study. Moreover, looking into design top brands on sources such as Dezeen, which identifies itself as “the world’s most influential architecture, interior and design magazine”. Dezeen’s hot list included all the brands already chosen from the global leader brands, but also included Aesop (Dezeen, 2019). Upon researching the Aesop brand it was realised that the brand’s vision closely revolves around localisation and therefore was added to the list of cases that are going to be used to develop the list of methods.

After identifying the global brands to be looked at, the focused turned to grey literature. Design and architecture catalogues available online were also examined, such as ‘Archdaily’ and ‘Dezeen’, along with articles reporting on developments for these brands. These usually included images of different stores and shop spaces, the names of architects or interior designers or firms that worked on the design, as well as written descriptions of those spaces. Each brand’s official website was also examined for images of stores, the brands’ mission and vision, and how this correlated with the way their brand was being translated into interiors. A list of methods that have been used to localise was created by looking into different localised global brand spatial experiences around the world, including Starbucks.

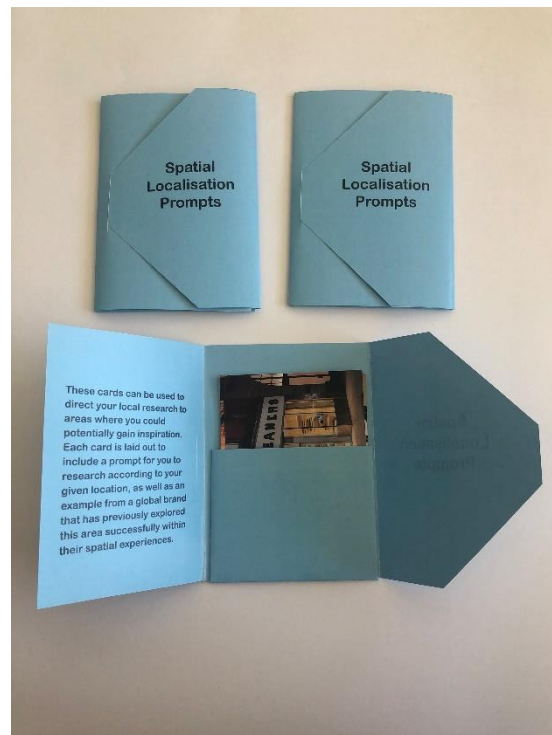
Therefore, a creative toolkit was created using the localisation methods found in order to create a way in which global brands can realise the different possibilities of localisation methods, and improve their localisation to have more of a variety of methods instead of relying on a few. The localisation methods toolkit is to be used in the generative phase of the design, when the store has not yet been designed and the team is trying to find a direction.

Final Creative Toolkit 1

The stores of the global brands around the world that were selected for the development of the cards were analysed, this revealed ten ways in which a spatial experience design can be localised. Therefore, the final creative toolkit included cards with the different local aspects that the team can take inspiration from when localising. Each card also included an example of a successful brand's store design that used that method to localise. The example is there to help relate the explanation of the method to how it can actually be applied successfully.

The final design included an envelope with the title of the toolkit on top: "Spatial Localisation Prompts" (Figure 31). When opened, the envelope has a pocket with all of the cards as well as instructions on how to use these cards on the side (Figure 32). The instructions state:

"These cards can be used to direct your localised research to areas where you could potentially gain inspiration. Each card is laid out to include a prompt for you to research according to your given location, as well as an example from a global brand that has previously explored this area successfully within their spatial experiences."



The ten cards included:

Card 1: Explore the site's past

Example: The example on this card was of Aesop's store in the Upper West Side of Manhattan, USA (Figure 33). The design agency "Tacklebox" was assigned to design this Aesop Store in a former dry cleaner locale. Tacklebox created display shelves with profiles of upside-down clothes hangers. The façade and signage of the original tenant was preserved. Therefore, the site's past was used as an inspiration to localise this specific spatial experience design (Dezeen, 2017).



Figure 33: Aesop Store, Upper West Side, Manhattan, USA. Source: Dezeen, 2017.

Card 2: Explore Local Art

Example: The example of this card was Starbucks's flagship store in Phnom Penh, Cambodia (Figure 34). The centrepiece in this flagship store highlights the distinct beauty and characteristics of urban Khmer art. The piece depicts Sovann Maccha from Cambodian folklore,



Figure 34: Starbucks flagship store, Phnom Penh, Cambodia. Source: Starbucks, 2017.

the siren princess (Starbucks logo) is transformed into two majestic Naga Dragons (Starbucks, 2017).

Card 3: Explore a Local Brand

Example: The example on this card was of Starbucks stores in New Delhi, India (Figure 35). The 50/50 joint venture, named TATA Starbucks limited, owns and operates Starbucks cafes, which are branded across India as “Starbucks Coffee: A TATA alliance” (TATA Global Beverages, 2012).



*Figure 35: Starbucks store in New Delhi, India.
Source: TATA Global Beverages, 2012.*

Card 4: Explore Local Craft

Example: The card depicts Starbucks’ flagship store in Shanghai, China (Figure 36). In this store the kettle is covered in a handmade copper panel, upon which are carved 60 or 70 different Chinese characters for words like “French press” and “Arabica” as conversation starters (Architectural Digest, 2017).



*Figure 36: Starbucks store in Shanghai, China.
Source: Architectural Digest, 2017.*

Card 5: Explore Local Materials

Example: The example on this card is that of the Starbucks store in the Carrosel du Louvre in Paris (Figure 37). The store uses recycled materials and features wood siding made from champagne boxes recovered from French winemakers, as well as chairs and coffee table designed by local craftsmen (Pinterest, 2018).



Figure 37: Starbucks store in Carrosel du Louvre, Paris. Source: Pinterest, 2018.

Card 6: Explore the Surrounding Nature

Example: The example of this card is of Starbucks store in Ocean & Alamitos, Downtown Long Beach, USA (Figure 38). The store takes cues from the nearby waterfront with a nautical palette of beige and blues. The designers embraced an existing concrete wall in the middle of the space to create a centerpiece of the Siren (Starbucks logo) in a sea of swirling waves (Starbucks Stories, 2017).



Figure 38: Starbucks store in Ocean & Alamitos, Downtown Long Beach, USA. Source: Starbucks Stories, 2017.

Card 7: Explore Local Heritage

Example: The example on this card is that of the Starbucks store in Fuzhou, China (Figure 39).

The store is all about “Wei Qi”, the ancient Chinese board game. The store also houses the famous, world class, first “Wei Qi” master museum (Pinterest, 2019).

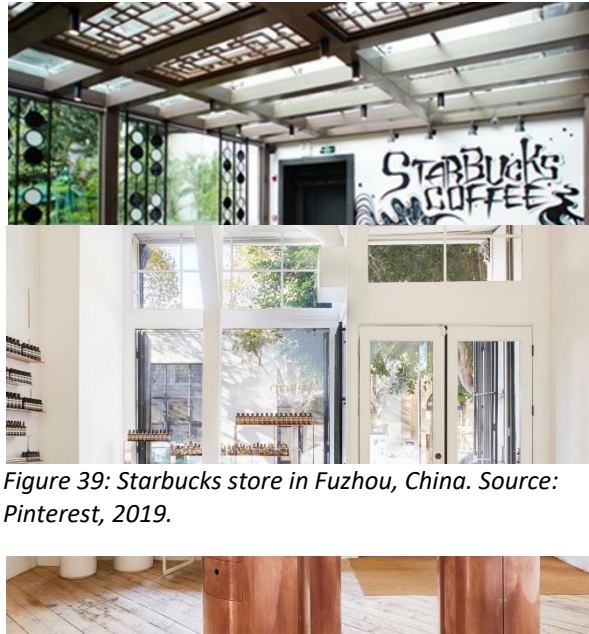


Figure 39: Starbucks store in Fuzhou, China. Source: Pinterest, 2019.



Figure 40: Aesop Store on Jackson Street, San Francisco, USA. Source: Archdaily, 2016.

Card 8: Explore the general “feel” of the area .Example: The example on this card is that of Aesop Store, on Jackson Street, San Francisco, USA (Figure 40). This store’s design pays homage to the tenacious spirit of the San Franciscans who first settled in the Bay Area (Archdaily, 2016).

Card 9: Explore Local Activities

Example: The example on this card was that of Starbucks “The Bank” in Amsterdam, Netherlands (Figure 41). This store includes window seat cushions, a centrally situated oak table and multi-level spaces that can be used as stages for local brands, poetry, reading and other



Figure 41: Starbucks store "The Bank", Amsterdam. Source: Dezeen, 2016.

cultural activities. Therefore, this Starbucks store positions itself as a cultural gathering spot in the middle of Amsterdam based on exploring the activities that interest the users in this geographic context and setting and encouraging them through the localisation of the spatial experience design of the space (Dezeen, 2016).

Card 10: Explore Local Designer's Work

Example: The example on this card is of McDonalds stores in France (Figure 42). McDonald's has put Patrick Norguet (French designer) in charge of designing a new architectural identity for its restaurants in France (Archdaily, 2012)



Figure 42: McDonald's store, France. Source: Archdaily, 2016.



Figure 44: Example cards on both sides. Source: Author.

Figures 43 and 44 show the final layout of the card, which included the localisation prompt's title, and an explanation of the example of a global brand store that has applied that localisation method. The other side of the card include the image of the store that was explained as the example.



Figure 43: Some of the cards on the side with the images of the stores. Source: Author.

The use of the card is flexible, as Sander and Stappers suggested, the team can choose one or more cards to combine together within one store. They can also use the cards to direct their research to other sources such as the Internet, books and movies. The first creative toolkit can also be used with the second creative toolkit developed explain in the next section.

Creative Toolkit 2: Multisensory Localisation Package

Development of Creative Toolkit 2

The second creative toolkit was developed to address the need for meaningful information about a geographic context and setting, in a multi-sensory manner that could be accessed from a distance.

The initial idea included triggers, as Sanders and Stappers suggested, however those triggers would not be visual, they would be sensory based on the needs of the participants as per previous findings. Those triggers would be local items or activities along with cards that explain the significance of this local item or activity much like the Starbucks team member that travels and brings back items for the rest of the team. Figure 45 shows the initial sketch that was drawn in the early stages.

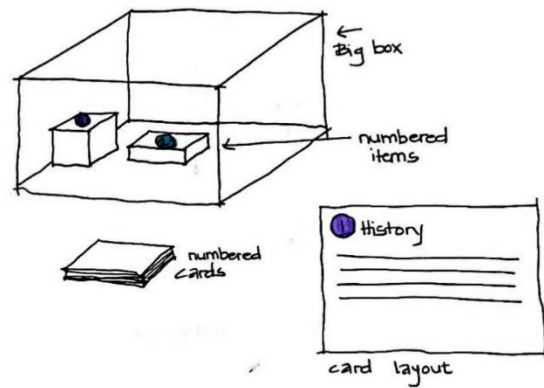


Figure 45: Sketch of Initial Idea. Source: Author.

Moreover, the initial idea did not take into consideration what will be done with the items in the smaller boxes and how the relationship between the different elements will be mapped out. Therefore, a way to map out all the different elements was developed, inspired by Sander and Stappers' ingredients for a toolkit which included a background. Other elements from Sander and Stappers' suggestions were also added, such as pins, pens, and scissors (Figure 46).

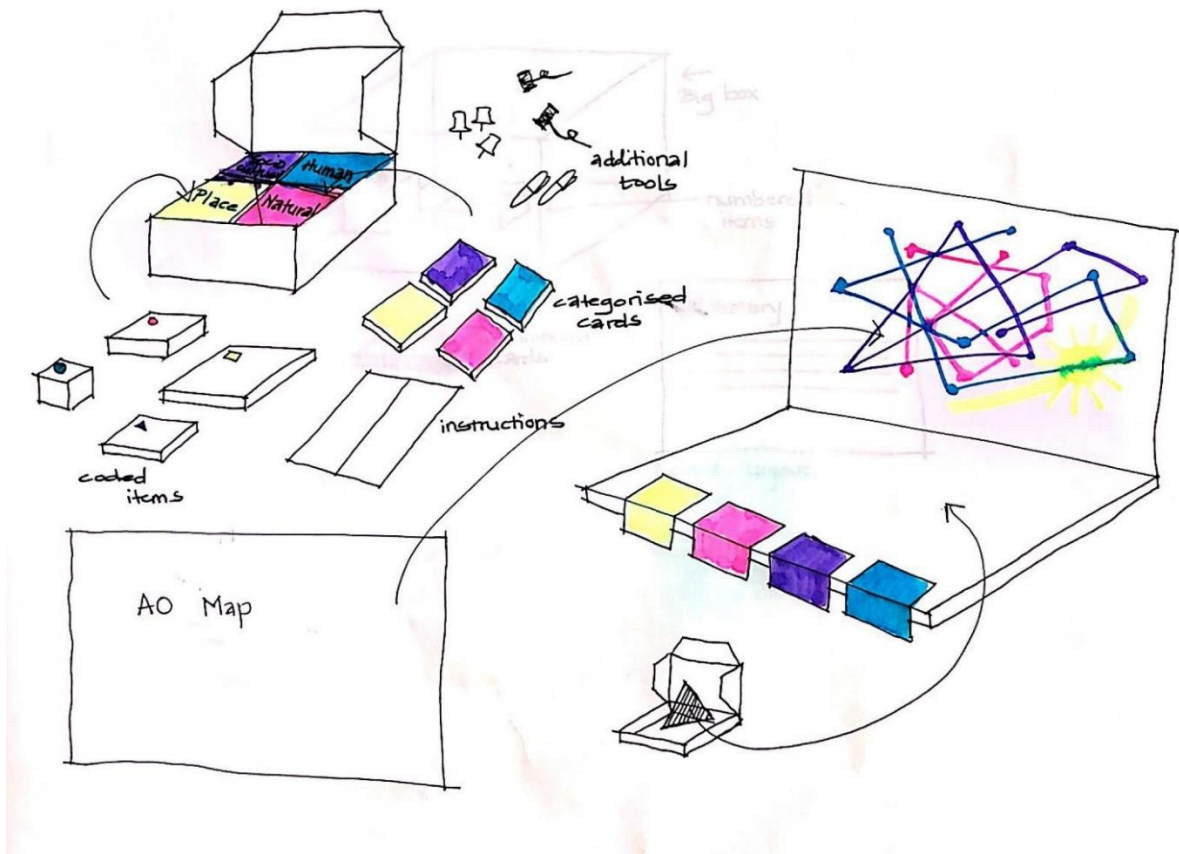


Figure 46: Sketched Toolkit after Background Idea. Source: Author.

Final Creative Toolkit 2

In real world situations, designers, managers and marketing teams within brands, would use the creative toolkits. The team designing from a distance in geographic context A would receive a package for the geographic context and setting that the physical site is located in (geographical context B). A person who knows geographic context B well curates this package in order for the information to be authentic.

Upon opening the package, the team in geographic context A would find the instructions page which includes how to use this creative tool as the first thing laying on top of the other elements within the box. This instruction page will first include a purpose statement about the intention of this creative toolkit, followed by the instructions.

The purpose statement would say:

“This creative toolkit has been designed to tackle the issue of design and distance when it comes to designing for remote geographic contexts and settings. The creative toolkit has been designed to give as much of a multisensory and holistic view of the geographic context and setting as possible. We hope this framework will encourage a deeper conversation about localisation between team members when localising different spatial experiences from a distance, and in turn creating more empathy towards the local counterparts in the geographic context and setting of the site. The aspects chosen to represent each context are curated by a team that knows that specific geographic context and setting very well.”

The instructions would say:

“1. Start by looking inside this instruction manual in order to uncover a general overview of the geographical context and setting that you are designing for.

2. Choose a colour from the set of colour-coded cards.

3. Follow the instructions on the cards as they lead you uncover differently-labelled objects within the box, and pin them into the appropriate location on the geographic context map provided.

4. Continue until you have completed all four sets of colours.

5. Refer to the back of this instruction manual to uncover what the final map might look like.

6. Revisit each category from the perspective of each sense.

That’s all you need to know to get going!”

The team in context A would read the instructions manual, open it up to view general information about context B such as language, location and currency, and pick up the cards. The colour-coded cards represent four general cultural categories including human, natural, place, and sociocultural. Each card in a specific category represents a sub-category. The “human” category includes the human elements such as how the people in that geographic context and setting interact, the demographics and the language. The “place” category included aspects such as transportation, the history of the geographic context and setting and the architectural

landscape. The “natural” category has information about the weather, sun path, ecosystem, and typography. The “socio-cultural” category includes information about the food, sports, art and crafts, holidays and activities.

The subcategories under the major categories (human, place, natural, socio-cultural) are represented by visual icons that match the smaller package for that subcategory within the larger package. The card will direct the team in context A to the related smaller package and explain the contents or activity. Some activities will be for touching, some will be for smelling, some will be to help map out related areas in order to understand the users in context B, depending on what the local team that curated the package in context B sees appropriate. The creative toolkit also includes stationary such as markers, pins, and scissors to conduct some of the activities. Most activities will be pinned or placed next to the A0 map, as the instructions on the subcategory suggest. The team in context A will end up with a map that illustrates in a sensory manner what the team in context B saw as information that would be vital to designing for that context, as guided by the categories.

The user in context A designing the site is free to choose which information they found inspirational as the creative toolkit is meant only to guide them. There are many areas from which the user can draw inspiration to localise the store, with more knowledge than that is available from a distance, especially in terms of sensory aspects. The first creative toolkit of the localisation prompts can be used together with this creative multisensory toolkit at this stage. For example, a few leaves and flowers from a certain natural context of a certain geographic location, found as part of the natural category, can be used as the inspiration to design using lines and colours from the surrounding context. Or they could indicate the surrounding nature that invites participation in certain activities, and therefore that becomes the inspiration to localise the spatial experience design. The possibilities are many within one subcategory, especially when used together with the spatial localisation prompts.

The multisensory toolkit also included a large map of the geographic context on a foamboard, allowing the user to pin the multisensory items on the map when possible, and lay them out on the table, in order to see a more holistic view of all the different cultural elements chosen and

how they interrelate. Throughout the process the team can then use this set up as a starting and grounding point for the cultural context.

7.4. Study Design

A series of workshops were designed where a team could use the creative toolkit in order to test its effectiveness. Even though in a real-world situation, the creative toolkits would be used by designers, managers and marketing teams within brands, budget and time constraints meant that realistically they would not be able to test the toolkits in their early stages. This section outlines the location of the study and the participants as well as reasons why these specific contexts were chosen. The configuration of the creative toolkits to the location of the study is explained subsequently. This is followed by data collection and analysis, and a discussion of the findings for this study.

7.5.1. Location of Study and Participants

The specific contexts chosen were Newcastle and Bahrain. Having local contacts in both contexts is important, therefore I had to choose a context in which I have previously lived. Being from Bahrain and having taught Interior Design at Ahlia University before going to Newcastle for my PhD, it meant that I had contacts with the University I taught in. It also made sense that Newcastle be the second choice context as I needed local contacts and it was where I lived. I contacted the lecturers teaching at Ahlia University at the time and they were interested in introducing a new idea around cross-cultural design. Therefore, we worked together to tailor the testing of the creative toolkits to work with one of the interior design studio classes.

The Ahlia University Interior Design program has five design studios throughout the four-year course. Each design studio focuses on a specific type of interior such as residential, retail, commercial, educational and healthcare. Therefore, the commercial design studio was the most appropriate for the introduction of a brief on store design, and was offered to twenty second-year students. The majority were of Bahraini Nationality, with two from Saudi Arabia, and one each from Jordan and Pakistan. The design studio courses are the closest to resembling real design problem solving, as the students are given a brief and they work on design solutions to address it. As the semester is five months long and the duration of the testing needed to be

shorter for data collection purposes, we decided that the testing of the toolkit would be done as a 6-week project, the rest of the semester would then be used to focus on another project. I suggested to the instructor of the course to have the students design for Aesop, as some of their store design guidelines are published online, as are other resources that document every store design result that Aesop has so that the students could see them for reference. The instructor agreed to the idea, and we started configuring the six weeks to suit both the testing of the toolkits as well as the course itself and its requirements. Each week is explained below.

7.5.2. Configuring the toolkit to the specific context

After the final toolkits have been designed, they needed to be configured to the contexts that were chosen for the testing. As decided beforehand, the creative toolkits were to be tested in context A (Bahrain, with Ahlia University, second year interior design students), and they are going to be designing for context B (Newcastle) from a distance. This is because of my knowledge and background in these two contexts, meaning that I could bring in my own knowledge about the contexts as well as knowing locals within the geographic contexts and settings that could offer authentic local insights into the culture. Therefore, the multisensory package toolkit needed to address the local context of Newcastle. The hypothetical site to be designed needed to be chosen carefully, as its specific history could alter the design according to the localisation prompt cards.

All of the content that went into the multi-sensory toolkits was configured by me with the help of the locals and people that live in Newcastle that I know from Newcastle having lived there. The supervisors also having lived in Newcastle offered a lot of helpful insight into the type of local knowledge that could be incorporated as part of the multi-sensory toolkit.

Mind mapping and brainstorming were used to come up with possible solutions and to choose the most suitable ones. The Merriam Webster English dictionary defines brainstorming as “the mulling over of ideas by one or more individuals in an attempt to devise or find a solution to a problem”. Brainstorming was done with my supervisor and peers until a viable solution was developed. Mind mapping was used to determine the finer details within the developed solution. An example of a mind map that was used is shown in Figure 47.

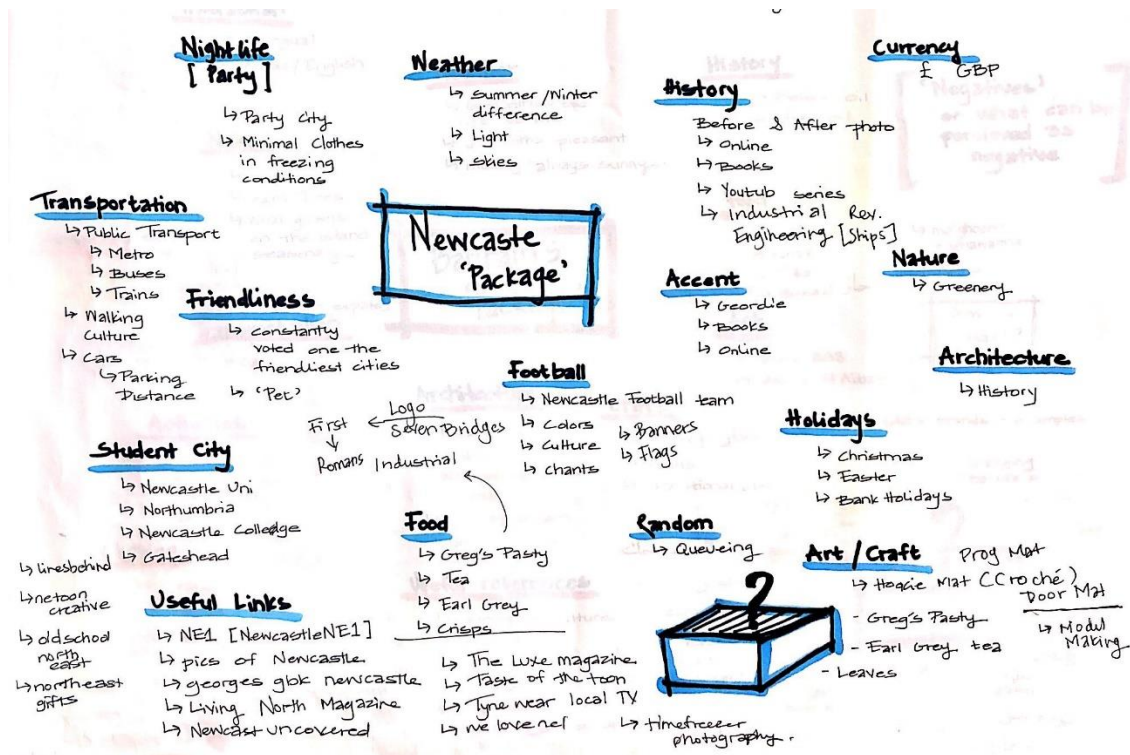


Figure 47: Mind Mapping for the Creative Toolkit. Source: Author.

A low fidelity prototype was developed once some of the components of the smaller boxes were determined with the use of the mind map and colleagues were asked what would be the best items to represent the culture of Newcastle, as they know it well. The card categories were created using coloured cards, the symbols and writing were drawn in marker pen. The multi-sensory toolkit was then laid out on a table with the map in order to understand the different components that would make up the multi-sensory tool (Figure 48).

Developing each activity for the multi-sensory package under each subcategory had to keep time constraints in mind, including the constraints of the class timing, which was twice a week for two hours. The completion of the creative multisensory toolkit was planned to take one class and one category for each group, so there had to be no more than 90 minutes of activities in one category all together. This included time for introductions at the beginning and time to share work with other groups at the end. Other constraints included the real life situation in which the creative multisensory toolkit should be used, in which time constraints were a barrier as previous findings suggested.

The table below is a full outline of cards for each categories' sub-categories and activities, with the approximate time that each would take to complete:

Understanding Newcastle Upon Tyne, U.K.			
Place			
Activity Title	Length	Objective	Activity
Transportation	30 mins	To understand the different routes possible to get to the given site with the different method of transport available. This could influence the signage and the experience of spotting and walking in the given retail space.	Use coloured tape to map out the different ways that the visitor can arrive at the site.
History	15 mins	To get to know how the area was shaped. This may influence the nature of the chosen site and it's qualities as well as people's preferences.	Compare maps of the area from 1894, 1914 and 1940 to today's map.

Architecture	15 mins	To understand the stylistic references of the area.	Analyse photographs of the major landmarks within the area and their significance. Explore the different textures surrounding the site with photo analysis. Compare photographs of popular places from the past compared to the present.
<i>Total Length:</i>	1 hr		
Human			
Activity Title	Length	Objective	Activity
Language/ Dialects	15 mins	To better comprehend how people communicate within the given area.	Identify the origins of the dialect by reading about it and listening to it.
Demographics	15 mins	To better understand the audience to the given brief.	Identify what draws people to the area. i.e. universities and the surrounding area.
Interaction	30 mins	To understand the nature of the relationships between people in the given area.	Through recommended blogs. List of commonly used words. Friendliness charts Queue Photographs
<i>Total Length:</i>	1 hr		
Natural			
Activity Title	Length	Objective	Activity
Weather	10 mins	To know the weather of the given context.	Weather charts and pictures.

Sun Path	10 mins	To understand the quality of light received throughout the year.	To pin a sun path diagram on the map as well as being directed to a website that explains the sun quality during the year.
Ecosystem	10 mins	To better grasp the colours and shapes that surround the area. Also possibly identify sources of inspiration for the design.	Photo analysis will be provided.
Typography	30 mins		Watch a video of a walk through Newcastle. Explore the typography map of the area.
<i>Total Length:</i>	45 mins		
Socio-cultural			
Activity Title	Length	Objective	Activity
Food	20 mins	People also connect to their cultural or ethnic group through similar food patterns. Immigrants often use food as a means of retaining their cultural identity.	Understand the importance of “Pastys” to the culture of the northeast by looking into pins and gifts. Compare global candy packaging from Newcastle to workshop context. Refer to the Newcastle cookbook. Understand the importance of tea.

Sport	10 mins	By bringing people together, sport plays an important role in societies as it builds solidarity and reminds us of the importance of being part of a community.	To look into the importance of football to the Newcastle culture by exploring the team's merchandise and chants.
Art/Craft	10 mins	Handicrafts were later improved and adapted according to environmental conditions, eventually becoming "traditional" and accepted as an art that reflects the artistic sense, feelings and cultural characteristics of a society.	Hooky and proggy rag mats were common in working-class homes in the North East until the mid-20th Century. Made from old sacks, clothing and recycled fabric, they were an economical option to keep feet warm in an era when fitted carpets were rare. In Victorian times and into the 1950s, houses in the North East of England used to be littered with stools called crackets! Every house would have at least one, and many would have two (a large one for grownups and a small one for the bairns).
Activities	10 mins	Doing cultural activities is the best way to explore what the city, town, borough, or community has to offer.	There is a distinct focus on the summer and winter seasons. The summer, punctuated by the temporary Blakett Street closures, family fun

			weekends and Northumberland Street Village Green, and winter, which is centred around Newcastle's new Christmas Markets offer.
Holidays	10 mins	Cultural holidays can be a great way to express something personal or to connect with the whole community.	Access the public holiday calendar.
<i>Total Length:</i>	1 hr		

Figure 49 shows the final multisensory creative toolkit configured to Newcastle context. The item labelled (a) is the larger box with the smaller colour-coded boxes (b) with specific icons matching the subcategories under four card categories (c). While (d) represents the instruction



Figure 49: Multisensory Creative Toolkit Configured to Newcastle Context. Source: Author.

manual, and (e) is the map of Newcastle printed on A0 foam board (the map was chosen as it is the most-popular recent map of Newcastle).

Figure 50a shows the cards for the category “place”, including each sub-category with the card with the explanation as well as the matching box with the activity content. Figure 50b shows the same for the category “human” including the sub-categories of: demographics, dialect and interaction. Figure 50c shows the category “socio-cultural” with the contents of the multisensory boxes such as local items from gift shops, Newcastle United Sportswear and chocolates, some of which are sold in both countries, others that are unique to Newcastle.



Figure 50: Category cards and Sub-categories. Source: Author.

Figure 43d shows the category “place” with the contents of the multisensory boxes including postcards, tourist books, and coloured tape for one of the activities.

7.5. Data Collection

The data was collected through a series of workshops where the creative toolkits were tested. The following section explains the activities carried out during each of the six weeks. Two meetings were planned for each week. All discussions with the class as a whole were recorded, as well as individual conversations between groups in weeks 1 to 3, however due to unforeseen circumstances weeks 4-6 were moved to online learning. The recordings were coupled with observations and photographs of the participants during the workshops. To make up for the lack of observation due to unforeseen circumstances in weeks 4-6, follow up interviews with students were done through recorded video conferencing.

Week 1 – Briefing and Research:

The sessions started by talking to the students about my findings thus far and how I reached this point. This was done by preparing a PowerPoint presentation. The issues of design and distance were explained, and the lack of variety in which brands localise was explained. The presentation also included a brief explanation of the use of the term “spatial experience design” and how it is an evolution of the current term “interior design” as the students are “interior design” majors. The presentation also included a summary of the aims of the series of workshops, before moving on to the brief. The briefing started out with an overview of Aesop, why it was chosen and some case studies of their localised experiences.

A pause was taken here in order to discuss the case studies of the different Aesop experiences from various geographic contexts and settings, which were taken from Aesop’s blog on store design (Taxonomyofdesign.com). These included the store design images, sometimes a video, an explanation of the philosophy behind the design, the designers or agency that designed the store’s profile, as well a full grid of all the materials used in the store design and a shot description. Aesop does not have a store in Bahrain as opposed to the other brands chosen (such as the case studies of Starbucks and IKEA). Therefore, it was chosen because there will be no prior biases when designing the store.

The requirements that the students needed to submit at the due date of their submission was then discussed, such as conceptual work, mood boards, technical drawings such as floor plan and sections, as well as 3D work. It was according to the requirements that they had to do for their course work, and they had done it before as they were 2nd year students. Their skills varied, some were more adept than others at using computer programs at this stage and software skills classes were not prerequisites for this course.

The site was explained with both dimensions, images of the exterior and interior, and a pinpoint on a map. The guidelines (Appendix E) for Aesop were also shared and some parts of the guidelines were highlighted and discussed. Areas such as Aesop's interest in design that improves people lives, celebrating the neighbourhoods they inhabit, and retaining original gestures if possible. The qualities that they try to evoke with their design were also highlighted as they put it in the guidelines: sincerity, authenticity and timelessness. The parts of the guidelines that were published online also stated that functionality is an important aspect, therefore it is important to consider the operations such as serving customers, transactions, receiving and managing stock and disposing of rubbish.

The participants were asked to individually research the Aesop brand further and the given site and location before the next class.

Week 2- Generating Ideas and Questions:

In groups of five, students were provided with the first creative toolkit (localisation prompts cards) developed to discuss and choose two cards that they would implement into their design project. The participants were then asked to individually start generating ideas and sketching initial design solutions for the brief. The participants were then encouraged to write down a list of questions about Newcastle's cultural context that they were unable to find information for with desktop research.

The class instructor prepared a lecture about retail design in general and the requirements of the operations and their relationship with design. She explained that aesthetics are important but they must not come at the expense of functionality. The students were also asked to do their own research about retail requirements to further understand their purpose.

In the next class, the first creative toolkit was introduced, which encouraged a variety of different ways to localise the spatial experiences within the design process. Here the participants were asked to form four groups of five as there were twenty participants. Each group of five was given the spatial localisation prompts cards and each individual within the group was asked to select two to apply in their own individual project. The participants were divided into four groups and asked to choose two cards so that a variety of different cards were chosen and fused together. This is to make sure that more than one person applies each idea to test it but in different ways rather than having a favourable card that everyone chooses, just like what happens in the design process of the global brands I researched.

In the next class we discussed the questions that they could not find answers to when researching. I explained to them that in the next class we would be testing out another creative toolkit that might answer some of the concerns that they had about not knowing where to find the correct, valuable information that would help them better understand the geographic context and setting and localise their designs.

Week 3 – Exploring the multi-sensory:

Using the questions that the participants provided in the previous session, as well as pre-gathered sourced, we provided participants in groups with a multi-sensory tool allowing them to experience one the four categories of cultural context in a holistic manner and then share it with the rest of the groups.

In the next class, the second creative toolkit was introduced: the multisensory toolkit. In a real world situation the team is supposed to go through all categories, but because of the limitation of the 2 hour class timing, the participants were split into four groups of five again and each was allocated a category. The team allocation was done by the class instructor who tried to include varying levels of student capabilities within each group for fairness. The first part, which was the instructions and the manual, was read out loud for the entire class. Then, the paper was passed around for each group to examine further. One Newcastle map was allocated to each group as well instead of one for the entire class. Each group picked up a category and

started reading the instructions while I went around to each group to ensure they did not have any questions. Each group had to present their category along with the map to the entire class after they finished in the next class.

Week 4, 5 and 6 – Developing and Designing:

The participants were then asked develop the design while being monitored however due to unforeseen circumstances they had to develop their design individually at home while being contacted through video conferencing. The design was also submitted electronically. This resulted in a lack of documentation over these weeks. However, to make up for that we sent the participants a feedback form, and interviewed five participants to discuss the process in relation to their design.

In the next class, they were supposed to start designing under observation, however because of the COVID-19 pandemic, Ahlia University suspended studies and attendance for two weeks. During those two weeks, there was no online teaching system yet, as the university was not prepared. Therefore, there was not much documentation as there was no contact with the students until one week before submission and the contact was online. During the two weeks, the instructor of the course contacted the participants and created a folder into which they could submit their designs and contact her through e-mail. The submissions were analysed and video interviews with some of the students were conducted in order to make up for the lack of documentation that week. Observing the students would have been better as any feedback received might be biased.

7.6. Data Analysis

The following section explains the weekly workshops and the observations of each week.

Week 1 – Briefing and Research:

From the discussion after briefing the participants not many participants were aware of the brand “Aesop”. Not many participants will have a prior view of the brand and this was seen as one of the advantages of choosing Aesop. Therefore, there were no prior biases when designing the store. The participants spoke positively about the willingness of a brand to localise, even if

in their opinion it means a slower distribution around the world (participants assumed because of the lack of presence in this area of the world and the surrounding middle east) as opposed to the other leading global brands.

Week 2- Generating Ideas and Questions:

When the participants came back after individually researching, a general discussion showed that the students had a lot of questions about the site, but the brand seemed to be clearer though the desktop research because of the store design blog published online and the design guidelines. Questions about the site included past uses, and contradicting information on the internet, such as some participants saying the site used to be an arcade while other saying otherwise. The participants were encouraged to list down these questions, as I would be asking for them during later stages to see how I could answer them from a distance later on.

The participants showed some concern here because “they have never visited the place” and they were worried they would not be able to authentically design it. They were reminded of my findings and what the aim of these workshops are, they were also reassured that they would receive support, and that we would be working on improving this process together.

The cards from the first creative toolkit (localisation prompts cards), were initially met with excitement from students, as they would be doing something different in the design course. However, once the students split after choosing their two cards, they had to research the way of localising in the context that they had which was Newcastle. Here the students felt like there was not enough information available for them to apply these very specific ways, such as taking inspiration from crafts, or the history of the site. Again, the participants were reassured this was not a test of their skills. Even though they were very willing to help and were excited, they did not feel like they had enough information.

This showed that the participants were aware that some of the information they found online was inauthentic, they had to search for more meaningful content in order to localise. There were questions such as: “The past site of the opticians shop was previously a music shop, based on <https://grayopticians.co.uk/team/> so was it an arcade or a music shop?” or “Is there a law

that forbids them from the stark colours in the design of the store, since the majority of the colours are quiet and dark”.

Week 3 – Exploring the multi-sensory:



Figure 51: Multi-sensory activity. Source: Author.

The activities were straightforward and the participants went along with them and seemed to really enjoy them, according to observation as well as the recording where they said it was a nice change from their routine work (Figure 51).

Some groups finished before others, one particular group in the “human” category finished their activities very early. They suggested the activities could have been improved by a video call to people living in that geographic context just to get to know that aspect better in order to add the activities that were already available and make them match the level of the other activities and duration.

“I think making each group choose a category meant that we missed out on some important information from other categories, I think developing a way where the theme rotates would help us understand it better rather than presenting to the whole class.”

Some participants preferred doing all categories themselves instead of listening to the group speak about their experience, because they felt like experiencing them would be closer to experiencing the geographic setting and it would ensure they did not miss anything.

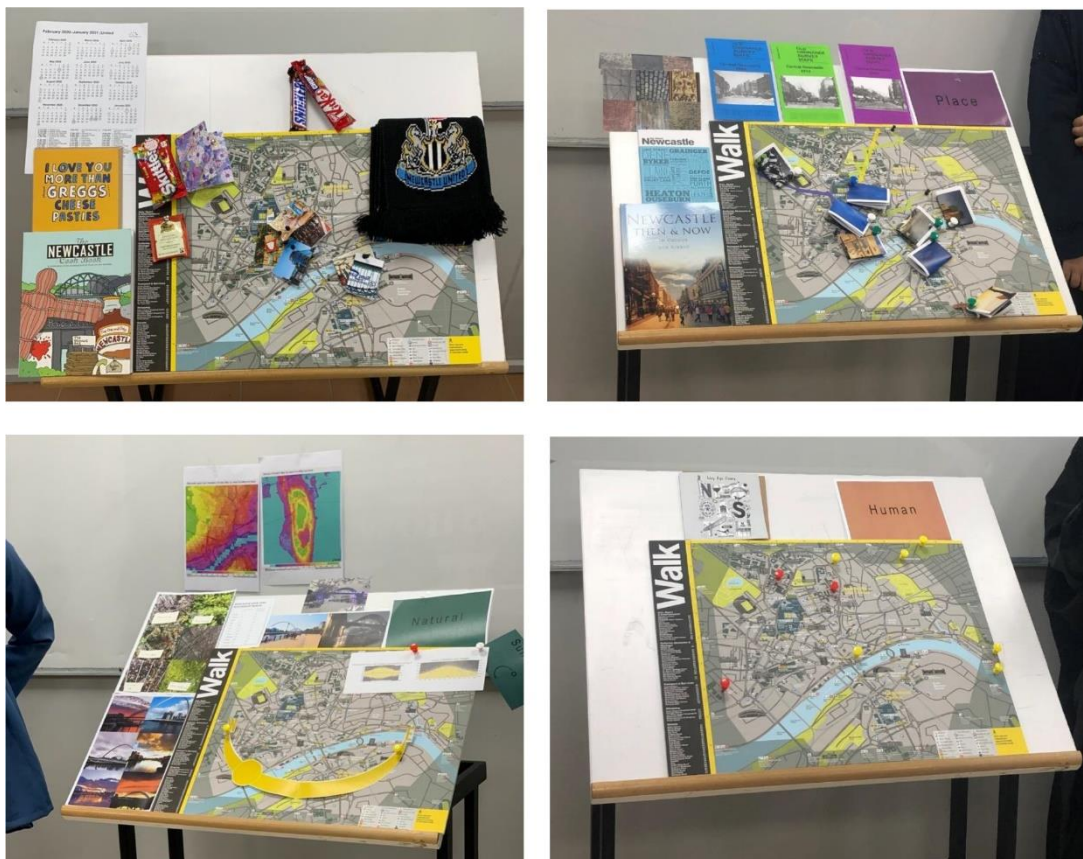


Figure 52: The final work on each category from the multi-sensory creative toolkit. Source: Author.



Figure 53: The students presenting their categories during the workshops. Source: Author.

After the multi-sensory creative toolkit the participants came up with discussion topics related to the cards that they choose from in the first creative toolkit. The students seemed more enthusiastic to begin the design process.

The participants also noticed how much they learned in a much shorter time versus what they learned from taking the initiative and researching on their own. One of the participants suggested: *“It was interesting how participants learned more about the city in 2 hours than they did in a week using online sources”*.

What was evident from the workshop was that the sources of inspiration compiled with the examples of successful global brands that implemented those, could not be properly implemented if the cultural context had not been fully understood. Therefore, while in the end

the participants found it useful, it is not beneficial if it is not accompanied by any method of understanding a cultural context other than the team's own initiative.

After having a better understanding of the cultural context some participants mentioned that the card activity gave them a clear sense of direction:

"The cards directed us to search for new information that we didn't know about the area."

It also gave participants deeper sources of inspiration, more than they would have if they had to pick on their own. One participant said:

"I liked how it made us see the area in a different way, deeper than what we would have seen from a classic Internet search."

Even though it was a large group of participants they were satisfied with the variety of inspirational sources available. One participant said that it made the selection of a concept much easier:

"It made finding a suitable concept easier as they were a variety of cards and options"

While another mentioned that even though there were many participants, and while they all had to choose from the same cards, there were no repetitive ideas, which showed that there were many possibilities when using the cards. The participant stated:

"The activity was so interesting, I liked how it opened so many possibilities for different concept inspiration even though the number of participants was high, no participant ended up with the same two cards as the other".

The use of the cards activity and the knowledge gained from the multi-sensory package was also evident through the participants final design work.

Week 4, 5 and 6 – Developing and Designing:

Participant W1 was inspired by the feeling of walking by the Tyne River and seeing how nature contrasts with the man-made bridge. Therefore, the design consisted of materials resembling

water such as transparent and reflective materials, as well as solid materials. Inspiration also came in the form on waves within the design (Figure 54).

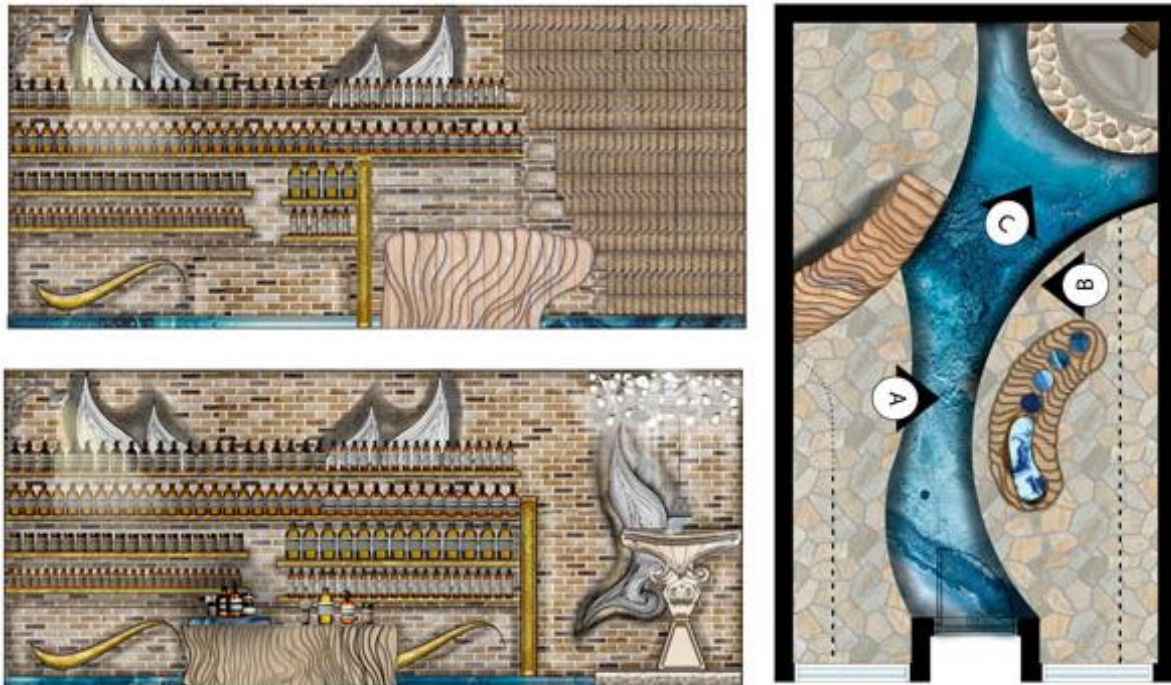


Figure 54: Participant W1 Final Design Sketches. Source: Author.

The Tyne Bridge was mentioned several times in the multi-sensory activity as an important element to the Newcastle locals (Figure 55). It was included as an important landmark, it was also seen in some of the videos, and was depicted in many seasons to convey the local weather in the activity.



Figure 55: Activities that included the Tyne Bridge. Source: Author.

Another participant (W2) was inspired by a local brand of Newcastle tea and how the locals use it as an activity to boost their mood and make them feel comfortable and relaxed. This was reflected throughout the space in terms of colours and materials. Tea was also available to experience in several ways in the multi-sensory activity. Cups of Earl Grey and Rington tea were given to the participants as a nod to the culture, along with a pin that reflected the local dialect and the way the tea makes them feel (Figure 56).



Figure 56: Tea in the multi-sensory activity. Source: Author.

Participant W3's final design work provides another example of using the contents of the multi-sensory activity as a major source of inspiration. The participant used the traditional local hooky matt craft as the main concept for the design work (Figure 57).



Figure 57: Design Work Inspired by the Hooky Matt. Source: Author.

7.7. Discussion

It is evident from the workshop that both creative toolkits advance the design of spatial experience that are localised from a distance. This was shown through observation of the students' reactions, listening to individual conversations between groups, discussion as a whole, and through the final design prototypes and drawings.

Taking a few hours at the generating phase of the design has definitely resulted in more conversations about localisation within a team. This is in line with the suggestions made by the participants interviewed in the case studies. It has also given the designers a multi-sensory understanding, which enabled them to have a better understanding of the local elements within a distant geographic context and setting. This was made apparent by observing the participants' and the nature of their questions after the individual desktop research versus their final designs after the introduction of the multi-sensory localisation package.

The first creative toolkit introduced within the process was difficult to use without the introduction of the second creative toolkit, which is the multi-sensory package. This might be because the cards include inspiration from real-life examples where the global brands authentically localised their spaces for special stores (as the stores chosen were not their regular stores as some of their regular stores are still standardised as previous findings showed). In order to authentically localise, they had to have an understanding of the geographic context and setting that the participants in the workshop did not have in the early stages. This means that the introduction of such creative localisation toolkits, such as the multisensory localisation package, could mean that even the general stores that global brands do not consider localising in because of budget and timeline constraints, can now localise because this is a way of bringing relevant information in from a distance in a shorter amount of time.

The restrictions of the timeline of the PhD as well as the COVID-19 pandemic, which suddenly stopping the workshops, meant that there were areas that could have been taken further in the workshop.

In order to advance the creative toolkits it would have been useful, and more in line with experience design literature to involve the users of the space in co-creation. The creative toolkits, especially the multisensory localisation package, already encourage co-creation because the package itself needs to be curated from the potential users and a person who knew the local culture very well. However, it would have been advantageous to add co-creation to the development phase, and the feedback phase. The development phase could have been added to the “human” category in the multisensory localisation package, as the participants already suggested that talking to potential users on video call would have made that category more helpful. It also would have included more content within the time taken to execute the other categories within the creative toolkit.

In the feedback phase, it would have been interesting if locals from context B (Newcastle) who the participants in Context A (Bahrain) were designing for could give feedback to the

participants. This would show whether the participants were able to authentically grasp a local's perspective.

Building on the findings of Chapter 5 and 6 as well as Khan (2018) theories with regards the localisation of branded spaces, Khan (2018) needing to express authenticity The toolkits reported on in this chapter attempt to create a easy to use, affordable way that global brands can be more authentic when localizing by making it easier to incorporate the experience design theories into practice in a summarized manner, keeping in mind the all the challenges and needs of both experience design and localisation.

This chapter's findings also builds on the movement of Decolonizing Design. The series of workshops which are reported on in Chapter 7 reverse the roles and allow Bahraini's to design for the U.K. This is not what is usually happening in a global brand and design context as it is usually the other way around.

The series of workshops which are reported on in Chapter 7 reverse the roles and allow Bahraini's to design for the U.K. This is not what is usually happening in a global brand and design context as it is usually the other way around.

Building on Hassenzahl, Suri and Rossman & Duerden's suggestion that experience design has developed more in theory rather than practice the workshops aimed to bridge that gap. Using the ingredients to make toolkits by Sanders and Stapper. Sanders and Stappers (2013) discussed methods and tools in the context of experience design and co-creative design. Sanders and Stappers (2013) talk about ingredients to make toolkits for co-creation and experience design.. These were used as a basis to the creation of the toolkits in this research. Adding to that the challenges were discovered and a solution was evidenced through the toolkits.

Chapter 7 also bring together the views from the different models introduced by Hands ensuring that the toolkits relate to a wider variety of different teams and the challenges faces, making it more generalizable rather than only focusing on specific type of design team.

Therefore, the findings from this chapter mainly focused on answering the second research question which is 'How could organisations advance their process using creative toolkits for experience designers and brand management teams?'. The study built upon the findings from the previous chapters (4-6), as well as the literature to bring together all of the knowledge gained throughout the research to create solutions based on the challenges and recommendations found.

7.8. Conclusion

The aim of this stage of the research was to create creative toolkits that could advance the localisation of spatial experiences within global brands as per the gaps identified in previous findings. The creative toolkits addressed the issues found in the lack of variety of ways to localise being employed even though the ways are evident in specialised stores. The creative toolkits also addressed the need for multi-sensory information about different geographic contexts and settings from a distance. This has to be done in an affordable and meaningful way. The creative toolkits focused on the generative phase of the design phase, as this is the part where most challenges were addressed in the previous studies. The creative toolkits were then tested by second year students at Ahlia University, Bahrain, in a series of workshops embedded into their coursework. Both creative toolkits enabled a better understanding in order to localise from a distance. The workshops showed that both creative toolkits are better used together, and some suggestions for improving them further were made evident.

Chapter 8: Discussion, Implications and Conclusions

This chapter reflects on the research project and discusses its outcomes. It discusses the collective findings of the main studies that form this thesis, and draws out the thesis's key contributions.

The chapter also discusses the wider implications of these contributions, as well as the limitations of the work conducted. It concludes by discussing potential future research related to the topic.

8.1. Discussion

The following section outlines the main ideas discussed in the literature review against the findings of the research and discusses how they relate. This section describes how the research reached the aims and questions set out in Chapter One.

The first aim of this research was to provide an understanding of what currently affects brand managers and experience designers of global brand teams working towards localising their spatial experiences to different geographical contexts and settings. The second aim is to develop creative toolkits that can be used when addressing the representatives of global brands in different geographical contexts and settings within spatial design. The main questions are outlined below.

Question 1

The first questions was *“Within the context of globalisation and localisation, what are the interrelations between brand management and experience design?”*

In the context of globalisation and localisation, many interrelations were found between brand management and experience design. As reported on in Chapter 2 (Literature Review) the interrelations between brand management and experience design within the context of globalization and localisation were evident from the early stages by reviewing the work of scholars from branding, design, marketing and management literature. The primary findings reported in Chapters 4, 5 and 6 built on the gaps identified in the literature review to further reveal new interrelations and build upon the previously found interrelations between brand management and experience design. Therefore, this section discusses the answer to the first

research question and is divided into two parts. The first part outlines the interrelations that were already established by other scholars, while the second part explains the interrelations revealed by the findings of this research.

Interrelations Found in the Early Stages

In Chapter 2 (Literature Review) the interrelations between brand management and experience design were shown through the branding, management, marketing and design literatures. From this early stage, it was clear that global brands need to localise their spatial experience design to different geographic contexts and settings in order to connect with customers, as it is proven to be a competitive advantage. Both globalisation and localisation were seen to be important to be considered in the spatial experience design of global brands. Several concepts can be found in literature that relates to global and local, such as “hybrid design” which is a term used to describe a design that has a blend of different cultures, to address this need, while concepts such as “glocalisation” are used to describe the global and local coexisting in one space. This can clearly be seen when looking into global history books related to design and other fields related to spatial experience design (such as Ajmar-Wollheim and Mola (2011) in the book *“Global Design History”*, and *“A Global History of Architecture”* by Ching et al. (2011)).

Even though both global and local aspects are important within spatial experience designs of global brands, the struggle to balance between them was evident. Therefore, we must add a layer of complexity to the management of global brands to balance glocalisation. A controversial question in the context of localising global brands is the extent to which global brand practices resemble those of the parent company (standardisation) versus the extent to which they act and behave as local firms (localisation) (Edwards, Sanchez-Mangas, Jalette, Lavelle, & Minbaeva, 2016; Cheon, Cho, & Sutherland, 2007; Pudelko & Harzing, 2007).

Moreover, in the literature review experience design boundaries were explored through existing literature, identifying the particular qualities needed to achieve experience design. The qualities needed to achieve experience design affected brand management decisions. Even though the literature did not clearly suggest or explore those interrelations, these interrelations were deduced from reviewing literature about experience design from the different fields. This

is because as at the time of writing, experience design as a concept was still dispersed across different fields, lacking many literatures that look at the topic from the perspective of the different related fields. As experience design transcends a singular field, certain literature looks into experience design extensively for example from a design perspective, other literature from a business perspective, but these fields do not come together to connect these findings in a collaborative manner. Therefore, to accelerate the maturation of experience design management literature, this research serves to reveal the big picture of experience research, thus mapping localised experience design research across two different interrelated disciplines.

The concepts that seemed to overlap by reviewing desperate literature on experience design from the different related fields are: co-creation, memory, multisensory elements and storytelling. The first concept that seemed to overlap in brand management and experience design literature is the concept of co-creation. Co-creation was encouraged in achieving experience design in literature in order to involve the users from the start, this is also a brand management matter in terms of allowing the designers time, funding, means or methods, in order to involve the users. This relation was vaguely apparent and was built upon in the primary findings reported in Chapters 4-6.

Other concepts included memory: memory is an important consideration in the design of experiences. It is also an important part of brand management, in terms of deciding which aspects of the brand the consumer is going to remember by creating positive associations. Furthermore, the concept of multi-sensory elements was also seen as an important consideration for both brand managers, especially as global brands moved to being multi-channel businesses, while spatial experience design literature also suggests that a holistic view of spaces means the consideration of multi-sensory elements. Relatedly, storytelling is an important aspect linking brand management and experience design. Brand managers need to create a story in order to engage users and connect to them emotionally, while spatial experience design needs to be aligned with that story in order to deliver the same message.

All these concepts including co-creation, memory, multi-sensory elements and storytelling would also not be possible without the awareness of brand managers and their integrations

into the different processes in global brands. The need for co-creation means time allocated at the beginning of the localising of experience design process and the need for the incorporation of multi-sensory elements means that the brand managers have to give the designers the resources to understand the multi-sensory elements. The need for storytelling and aligning the story throughout the different touchpoints means involving the right multi-disciplinary teams, with the appropriate skills and cultural backgrounds, and putting in the appropriate processes, tools and methods to support those teams in the localisation of spatial experience design.

Chapter 2 (Literature Review) also set the foundations upon which the primary studies were based, leading to more insight into the interrelations between brand management and experience design. In Chapter 2 it was evident that although the interrelation in literature exists between brand management and experience design, authors who specialise in the fields of experience design (Hassenzahl et al., 2021; Suri, 2003) and experience management (Durden et al., 2019) suggest that experience design is more developed in literature and not necessarily applied correctly in practice. Chapters 4, 5 and 6 therefore sought to investigate that gap with interviews and a Delphi survey with managers, marketers and designers within global brands, as well as a review of archives and grey literature on global brands' localisation of spatial experience design in different geographic contexts and settings.

Further Interrelations Investigated Through Primary Findings

Through the findings reported on in Chapters 4-6 the participants confirmed the importance of localisation within the context of global brands and spatial experience design. The primary data also revealed the challenges global brands face in applying some of the concepts of localised experience design found in literature from a management perspective. Even though participants were aware of the importance of localising experience design, issues such as balancing between expertise and diversity (Chapter 4), issues in flexibility with design processes with the headquarters (Chapters 4 and 5), issues of design and distance (Chapter 5) and budget and time constraints (Chapters 4-6) were apparent, strengthening the link between brand management and experience design found in literature.

Chapter 4 reported on the challenge of expertise versus diversity. Participants often discussed the relationship between expertise and diversity within globally-distributed teams. Expertise was expressed in terms of skills and professional backgrounds that were seen as necessary in the design, marketing and management of global brand teams. This was talked about both in terms of disciplines, such as different design expertise (design, marketing and other disciplines), but also in terms of diversity within teams in understanding different local cultures and ensuring team members brought experiences from different geographic backgrounds and knowledge. Some participants saw the integration of different geographic backgrounds and knowledge as important because each can bring their own unique perspective that will help localise different spatial experiences. However, the interviews also highlighted that diversity can sometimes be a burden in brand management because it potentially challenges global teams in terms of the distribution of the team members at different sites, which creates distance and brand managers therefore need to develop processes to mitigate this. Successfully balancing between diversity and expertise is a way in which management and experience design interrelate. Management makes the decisions in constructing the teams and putting in the requirements for the required set of skills, making it possible to get people of specific cultural backgrounds onto the team or seeing that it is not necessary. As the findings suggest, sometimes having team members from specific backgrounds is not viable, so managers prefer to enable designers to travel to locations to get inspiration instead. All of these managerial decisions affect how meaningful the localised spatial experience will be for global brands.

These findings about expertise and diversity build upon the work on Sanders and Stappers (2012) and link it to the challenges found in experience design and experience management literature. Sanders and Stappers (2012) suggest that traditional disciplines are fading and disciplines such as “interior design” and “architecture” are blending into “experience design”. The findings revealed that the traditional disciplines are not necessarily fading (as Sanders and Stappers (2012) suggested), but successful brand management can influence how well these traditional disciplines are brought together by multi-disciplinary teams blending together and how these teams are managed. The time, budget, design management models, methods, processes, and toolkits offered to teams that work into translating global brands into different

geographic contexts and settings impact the end result of the localised spatial experience. The need for both successful global brands investigated in the case studies (Chapter 5) to employ “interior designers” or “retail designers” proved both that traditional disciplines are not exactly fading and but they need to be managed in order to blend and create a holistic view of spaces and thus create successful localised spatial experience design. Starbucks for example manages the integration of the different disciplines of interior design and art by creating the “Starbucks Art Program” as a tool that the retail designers can use in their design process. However the “Starbucks Art Program” comes with its own set of challenges, these are reported in Chapter 7 and discussed within the next questions of the research addressing the second aim of the thesis. IKEA also make up for the balance of expertise and diversity by employing interior designers, however creating a design process that uses “home visits” as a way of management that encourages designers to consider meaningful localisation.

The need to have “interior designers” or “retail designers” on the multi-disciplinary teams further builds upon the literature as well, suggesting that physical spaces remain an important part of delivering the overall experience of a brand even though brands have moved to being a multi-channel business (Pine & Gilmore, 1999; Suri, 2000; Teufel & Zimmerman, 2015).

The interior design profession, which evolved to include experiential qualities leading to spatial experience design, also requires qualities that were apparent through overlapping experience design and management literature: such as multi-sensory elements that influence the memory of the visitors of the brand. These multi-sensory elements in the branding, management and design literatures were suggested by many authors (including Pullman & Gross, 2004; Sloane, 2014; Motoki et al., 2021; Jang and Namkung, 2009; Douce and Janssens, 2013; Krishna, 2012; Pullman & Gross, 2004; Sloane, 2014; Motoki et al., 2021, Rye and Jang, 2008; Liu and Jan, 2009; Gobé, 2006, Chaterjee, 2015; Batista, 2016; Biswas, 2016; Majid, 2021; Neves, 2017; Romanos et al., 2019). The extensive literature found on the topic of multi-sensory elements and their influence on memory in the context of globalization and spatial experience design is extensive. However the findings, particularly on the two successful global brands (Starbucks and IKEA) showed that it is not yet embedded with the same importance in processes. Even though the participants of the case studies understood the important of the multi-sensory

elements, they suggested adding those multi-sensory elements as areas of improvement, and not an area that they felt was covered well by their current processes. Participants throughout Chapters 4-6 in several stages of the research repeatedly suggested that the multi-sensory element was an important element in localising spatial experience design that can still be embedded further into the brand management process when localising spatial experience design.

Other than diversity and expertise, the expertise of multi-disciplinary teams had to be divided in terms of geography and team structure. Participants also touched upon how teams can be distributed and how that affects the localised spatial experience design. These qualities, mostly reported on in Chapter 4, were dependent of the scale of the teams and their organisation. Some suggested the larger pool of employees be split into smaller teams or individuals focused on a specific aspect. The effect of the distribution of the teams on localisation of spatial experiences was evident through the findings, which were not evident in the literature.

Chapter 2 (Literature Review) already revealed that there are different design management models, such as in-house, outsourced, or a blend, each with their advantages and disadvantages. However, the findings revealed deeper insights into the different models that exist under the same design management model, such as in-house, and how these different branches under the same design management model influence localised spatial experience. This was mainly elaborated upon in Chapter 5 as two successful global brands were investigated in detail and revealed that there are different branches under the same design management model, also revealing that different design management models lead to different issues of design and distance.

Even though both case studies had an in-house design team, the geographic distribution was different, bringing different challenges. We were told in interviews that the management of the EMEA market was split into two offices: one in Amsterdam and one in London. The London office is responsible for the U.K. stores and a small portion of Europe, while the Amsterdam offices are responsible for the rest of the EMEA stores. The store design teams are split based on the licensee, and vary from two to five members, depending on the size of that market. The

teams are always composed of one design manager and varying levels of designers. Therefore, the team is usually based remotely. IKEA has its own in-house design team much like Starbucks, however they are grouped very differently. Instead of grouping all the designers in one team, IKEA has local designers dispersed into each one of their stores, also acting as the local knowledge contributors to that specific market. This is because when the home visits to local homes are conducted for research purposes, people from the local team are invited and their inputs are taken into consideration. Looking at the Starbucks and IKEA examples, it is evident that a global company has to choose between the team being in close quarters, and the team being close to the locations depending on their strategy and then develop tools to help fill the gaps that either choice entails. Semi-structured interviews revealed that Starbucks chose to have the teams in close quarters and made up for the team being distant with travel, databases, art programs, and other sources of local inspiration such as reading books, watching movies, and testing local products. Unlike Starbucks, IKEA chose to have the teams on location and encouraged collaboration between the teams using an intranet page.

Other brand management concepts that were evidentially influencing the practical application of localised spatial experience design include flexibility and permission from the headquarters to localise. This was first evident in Chapter 2 where standardisation was generally understood as the implementation of strategies in line with management practices employed by headquarters, reflecting the country-of-origin effect (Pudelko & Harzing, 2007). Localisation, on the other hand, considers the inherent diversity of each international market framed by the cultural context in which the brands are embedded (Singh, 2011). This was also evident in Chapter 4 in the preliminary interviews where it was highlighted that in the participants' cases the central office is where major adaptations to the localised spatial experience are approved. The participants also suggest there is a lot of human negotiation in adapting a brand, and getting authorisation for this. This shows that often it is not a clear formal process, but something negotiated on a case-by-case basis. This also shows that local counterparts are given some flexibility in the decision, supporting the decolonisation of design. While the headquarters mentioned were Western in some instances, the local team in the UAE was given permission to adapt as they saw appropriate, but within limits.

Budget and time constraints were also challenges from a management perspective that affected the practical application of spatial experiential design within global brands. Budget and time constraints were first evident in the findings of Chapter 5 where travel was seen as a way of immersing the team into the multi-sensory culture of the geographic context and setting in the early stages of the design process, but it was not always possible due to budget and time constraints. Therefore, the team had to come up with more budget and time-efficient ways of understanding the multi-sensory nature of the geographic context and setting. The ways included senior members bringing back items from the context, or watching movies and reading books about the context. The budget and time constraints came up again in the Delphi surveys (Chapter 6) where participants suggested the need for affordable and easy-to-use solutions.

Question 2

The second question was *“How could organisations advance their process using creative toolkits for experience designers and brand management teams?”*

The findings for question 1 established that there is value in localising spatial experience design. The findings also confirm that the processes currently in place need improvement. The Delphi survey confirmed those findings and added consensus on the need for a creative toolkit to help localise spatial experience design. The Delphi survey also offered insight into what the characteristics of this creative toolkit should be (namely: ease-of-use, affordable, and multisensory) to promote meaningful engagement with locals and contexts. The findings suggest that there were issues of design, distance, budget and timeline hindering the application of the experience design values.

Therefore, in order to advance the processes using creative toolkits, two creative toolkits were developed based on the interrelations and challenges found from the primary findings in Chapters 4-6. The creative toolkits that were developed and later tested in a series of workshops are reported on in Chapter 7.

The creative toolkits aimed to bring more co-creation and make it possible to integrate more while factoring in the challenges that are barriers to implementing it more within the design process.

The first creative toolkit that was developed aimed to address the scarcity of ways to localise that is being practiced in some of the global brands' spatial experiences. (such as Starbucks Art Program) promoting a reliance of art to localise when there are many other ways. Therefore, a creative toolkit was created using the localisation methods found in order to create a way in which global brands can realise the different possibilities of localisation methods, and improve their localisation to have more of a variety of methods instead of relying on a few. The localisation methods toolkit is to be used in the generative phase of the design, when the store has not yet been designed and the team is trying to find a direction.

The first co-creative tool introduced in the series of workshops is reported on in Chapter 7. The "Spatial Localisation Prompts Cards" included many ways to encourage the designers to take inspiration from co-creative strategies. The cards encouraged co-creation including directing the teams to take inspiration from local crafts, materials, designers and artists. Those co-creative strategies were seen to have been practiced by global brands by reviewing case studies, however, they were not evident in the regular stores and therefore not in the design process of the designers of the stores when interviewed. There was a disconnect, since reviewing the case studies of different stores of the global brands in different geographic contexts and settings through archives showed that the global brands do practice these strategies. However this was explained by the interviews, which explained the strategy visualised in Figure 58. At the top of the pyramid are the premium Starbucks stores; the core stores are below, and become less and less premium towards the bottom. The most premium stores offer the maximum look, feel and experience of the brand. The budget decreases based on the store's position within the pyramid. Thus far, the Starbucks strategy is to localise all locations, but to pay closer attention to the highest-placed stores in terms of delivering the maximum experience of the brand.



Figure 58: Starbucks Pyramid Strategy. Source: Forbes, 2016.

The second creative toolkit, also reported on in Chapter 7, was developed to address the need for meaningful information about a geographic context and setting, in a multi-sensory manner that could be accessed from a distance. In real world situations, designers, managers and marketing teams within brands, would use the creative toolkits. The team designing from a distance in geographic context A would receive a package for the geographic context and setting in which the physical site is located (geographic context B). A person who knows geographic context B well curates this package in order for the information to be authentic. This co-creative toolkit encourages the merging of many important qualities found to be vital for both brand managers and experience designers. These qualities are co-creation, multi-sensory elements, memory, and storytelling. It also takes into consideration that these qualities are embedded into the design process of the spatial experience designers when localising, but it also keeps in mind the barriers that previously prevented the practitioners of applying the advancements of experience design seen in the literature into their practice.

Testing Toolkits in the Context of Bahrain

It is evident from the workshop that both creative toolkits advance the design of spatial experience that are localised from a distance. This was shown through observation of the

students' reactions, listening to individual conversations between groups, discussion as a whole, and through the final design prototypes and drawings.

Taking a few hours at the generating phase of the design has definitely resulted in more conversations about localisation within a team. This is in line with the suggestions made by the participants interviewed in the case studies. It has also given the designers a multi-sensory understanding, which enabled them to have a better understanding of the local elements within a distant geographic context and setting. This was made apparent by observing the participants' and the nature of their questions after the individual desktop research versus their final designs after the introduction of the multi-sensory localisation package.

The first creative toolkit introduced within the process was difficult to use without the introduction of the second creative toolkit, which is the multi-sensory package. This might be because the cards include inspiration from real-life examples where the global brands authentically localised their spaces for special stores (as the stores chosen were not their regular stores as some of their regular stores are still standardised as previous findings showed). In order to authentically localise, they had to have an understanding of the geographic context and setting that the participants in the workshop did not have in the early stages. This means that the introduction of such creative localisation toolkits, such as the multisensory localisation package, could mean that even the general stores that global brands do not consider localising in because of budget and timeline constraints can now localise, because this is a way of bringing in relevant information from a distance in a shorter amount of time.

8.2. Recommendations for Global Brands when Localising their Spatial Experience Design

Key ingredients that brands need to employ to successfully translate their global brands into different geographic contexts.



Figure 59: Recommendations to Global Brands when Localising Diagram. Source: Author.

a. Holistic View of Spaces

Research findings that support this recommendation:

Literature by Pitrowski (2013) showed that interior design has evolved from decoration in early times to be more holistic throughout time. Other interior design literature also advocates for a more holistic view of spaces Teufel & Zimmerman (2015), plead for a new generation of retail designers who approach the design process in a holistic way. They suggest that this multi-disciplinary field needs to be better understood and more interconnected through disciplines, with methods and tools to enable better communication across designers and organisations. Experience Design literature also strongly advocates for a more holistic view of spaces. Dodworth (2015) references the on-going discussion was prompted about the differences between interior decoration, design and architecture. The debate is on-going at the time of writing, and Dodworth (2015) states that it is partly because the distinctions between these aspects of interior design are not absolute. In the book titled “The Fundamentals of Interior

Design” Dodworth (2015) tried to define the boundaries of interior design, interior decoration, architecture and interior architecture. However, the findings of this research showed that trying to define the boundaries of these professions is no longer necessary, promoting a more holistic view of spaces. This is because when linked to experience design theories, within interior design, visitors do not experience the architecture, interior and decoration separately from each other, but all of these factors work together and also include other area such as graphic and service design to create the users experience of the space. Even though these professions need to be included as part of the team that will translate the global brand to different geographic contexts and settings the focus should not be on the boundaries but on how the disciplines can be incorporated together as the visitor will not be able to differentiate between them as they will experience the entire space holistically.

Practically applying the recommendation:

A mix of different aspects is needed in order for a global brand to view a space holistically. This included not trying to define the boundaries between the spatial disciplines and rather focusing on these different disciplines such as real estate, interior design, architecture, interior decoration, interior architecture, as well as the other design disciplines such as graphic design, and business disciplines such as branding all go together and interrelate. To practically apply that the global brand needs to consider multi-disciplinary teams, different cultural backgrounds in the teams, and a multi-sensory understanding of the geographic context and setting.

b. Multi-disciplinary Teams

Research findings that support this recommendation:

It is clear from Hassenzahl, Suri, Roto and Teufel & Zimmerman’s research into experience design that the area of experience design can be developed further. They suggest that this multi-disciplinary field needs to be better understood and more interconnected through disciplines, with methods and tools to enable better communication across designers and organisations. Findings in retail design also reflect a need for practitioners whose knowledge goes beyond the creation of functional and aesthetic store environments (Claes et al. 2016). In the literature review I explained that prior literature had observed the need for different

disciplines to come together in order to deliver a successful spatial experience design (Lemon & Verhoef, 2016; Suri, 2003; Kalback, 2016, Best, 2010; Hands, 2008; Steers et al., 2012). The interviews reinforced the need for a different range of expertise in terms of skills and professional backgrounds, especially in the context of experience design, as multi-disciplinary teams are needed. The findings confirm the need for a range of different skills and professional backgrounds.

Practically applying the recommendation:

Different disciplines are needed within the teams that will translate the global brands to different geographic context and settings. This is to ensure a holistic perspective is taken into consideration. Also, because of the many complex layers within spatial experience design and the need for a holistic view of branded spaces, it cannot be a one-person job. Many disciplines that need to come together to make the translation of global brands to different geographic contexts and settings successful, and they need to collaborate rather than just work alone and then bring information together, ensuring efficient communication, back and forth, and constant circles or review, feedback and sharing knowledge throughout the timeline of the project from the early stage to implementation.

c. Authentic Localisation

Research findings that support this recommendation:

The literature review showed that Experiences and localisation can both add that competitive advantage however, experiential management authors J. Rossman and Duerdon add that experiences can be done superficially or inauthentically, other authors suggest that the same can be said for localisation, (Khan, 2018; Ching et al, 2011). Khan (2018) further quotes Van Veen: "...localisation is about mattering more to people. Globalisation, digitisation, and urbanisation are dehumanising cultural contexts to which brands must respond." Related to the concept of re-humanising cultural contexts (Khan 2018), is the movement of decolonising design.

Throughout the interviews the importance of localisation to the participants and the brands they work for was evident. This demonstrated that localisation is widely accepted within global

brands; however, it is not always practiced. Findings from the interviews confirmed that Starbucks practices localisation in relation to spatial experiences. Participants discussed the importance of localising and suggested that even though it is practiced, it can be further embedded and taken even further. IKEA participants also suggested that localising is important in order to be respectful of other cultures, but at the same time suggested that in order to do so, the brand's identity needed to remain strong. The Delphi survey findings showed similar patterns within additional different global brand teams, reconfirming the value of localisation within spatial experiences.

Practically applying the recommendation:

Authentic localisation can be achieved by involving local in co-creation, as well as considering diverse backgrounds as part of the teams that translate the global brands spatial experience into different geographic contexts and setting. Authentically localising also mean considering multi-sensory elements of the context, tangible and intangible elements, as well as giving the team more time and budget in order to understand the geographic context and setting.

d. Strong Intangible Qualities

Research findings that support this recommendation:

In the case of Starbucks the findings showed that there is no rulebook on how to be locally relevant — the inspiration and work are quite organic. However, there are certain core values against which every design is judged. Those values can easily be translated into different locations around the world. The first is human connection, followed by warmth and honesty. Connecting people over coffee can be translated into different seating arrangements, depending on the country. Meanwhile, warmth can be translated by the use of certain colours and materials. Honesty translates by paying farmers and artists in an honest way, and in terms of space, selecting real, honest materials.

Practically applying the recommendation:

Brand mantras that can translate to different physical and visual elements based on the culture when it comes to being translated into spatial experiences. Such as the example of “warmth” in Starbucks brand mantras.

e. Understanding the Boundaries of Experience Design

Research findings that support this recommendation:

One of the purposes of design, in the experience dimension, is to create the conditions that allow the experience to be created in a planned way (Capra et al, 2019). This section explores the literature that suggests that experiences are subjective in nature, and therefore contain parts that cannot be designed for and are out of the designer’s and the manager’s control. Therefore, since the literature related to experience design is so dispersed, bringing this literature together within this research helped facilitate the development of clear experience definitions and propositions about experience characteristics, which will help facilitate increased interdisciplinary experience-design-related understanding.

Practically applying the recommendation:

Focus on the objective elements that can be designed for such as co-creation, multi-sensory, memory, and storytelling.

f. Flexibility in Touchpoints

Research findings that support this recommendation:

Flagship stores, as an accepted strategic market entry channel for global brands, are noted as the most appropriate store typology for retail design localisation. Flagship stores are experience-focused with the objective of establishing brand meaning and institute consumer connections rather than satisfying a profit motive. As a strategy for localisation, the flagship store catalyses often derelict areas into thriving social hubs. Sharma argues that flagship stores act as social anchors, rather than conventional shopping opportunities.

Practically applying the recommendation:

Reconsidering physical spaces purpose. For example creating Flagship stores that are not necessarily heavily relied upon as point of purchase just creating a strong memory for the user which can then go and use other touchpoints to purchase.

g. Multi-Sensory Understanding of Context

Research findings that support this recommendation:

An exploration of experience design that happened in the second-generation literature is the importance of the role of senses in experiences, as suggested by Pine and Gilmore, which attracted many researchers. Pine and Gilmore suggested the importance of senses specifically in the physical context as mentioned previously, as well as in their abstract to do list for creating experiences (Pine & Gilmore, 1998).

The suggestions from the participants of the research reflected the need to understand the cultural history of the geographic settings and contexts, the preference to experience it personally rather than passively, as well as budget constraints. The suggestions revolved mostly around bringing out intangible elements in order for people to experience the culture but from a distance, due to time and budget constraints. For example, many participants mentioned a multi-sensory platform, such as visual items, and feature scents that are unique or important to the people living in that specific geographical setting or context.

Practically applying the recommendation:

Heavily relying on visual senses does not give an accurate understanding on the geographic location – rather the designer need to have a multi-sensory understand of the space related to the other senses as well.

8.3. Contributions to New Knowledge and Understanding

This doctoral research has explored a context that the existing literature does not sufficiently cover. In doing so, the research has resulted in insights and contributions to the topic of enquiry. These contributions can be summarised as:

- This research serves to reveal the combine the different interrelated disciplines together which are globalization, localisation, brand management and spatial experience design.

This is in relation to answering the first question of the research which is “Within the context of globalisation and localisation, what are the interrelations between brand management and experience design?”. Many interrelations were revealed in early stages in the literature review that were not previously connected and mapped out. These interrelations were later built upon with the methods used as part of this research. These interrelations included links between interior design and experience design, interior design and localisation, experience design and design management, global brands and the localisation of spatial experience design. The interlinks in literature are further explained in Chapter 2, while the interlinks found through the different research methods used can be found in the findings chapters including Chapters 4, 5, 6 and 7, then they are further elaborated on in the conclusion (Chapter 8).

- The research also confirms the value of authentic localisation through both the mapping the important of localisation through the different interrelated fields in the literature, as well as through the participants perspectives. This was to answer the first question of the research which is understanding the interrelations between brand management and experience design, but also in order to justify the need to create toolkits for experience designers and brand management teams in the second question of the research. The value of localisation first came through in the literature review (Chapter 2), then in the interviews and Delphi survey (Chapters 4, 5 and 6). Interviews conducted with seven professionals from the fields of management, marketing, branding and interior design highlighted the importance of localisation, as discussed in the literature review. The participants in the preliminary interviews even thought that there currently were weak points in the localisation processes, offering solutions as to how it can be taken even further. This was further elaborated upon through two case studies with two successful global brands, namely Starbucks and IKEA. The findings from the case studies highlighted that both of the case study brands acknowledge that localisation is necessary. Looking at Starbucks and IKEA, it is evident that global companies and brands like these have to make key decisions between teams being in close quarters to one-

another or teams being close to the locations they serve. These are typically economic and resource-driven decisions. The organisations then have to provide tools to help fill the gaps that either choice entails. A further layer of validation was added by conducting the Delphi survey. The Delphi method chosen ensures the selection of expert panelists to reach a consensus on areas that were still under speculation. The panelists included 15 participants who were members of different global brands' "in-house" design teams; and 11 participants who were members of design teams from organisations who were outsourced by global brands to do their interior design work. The findings confirmed that other global brands also find localisation valuable. The findings also showed that other global brands with other ways of distributing designers around the world also faced issues of design and distance, and therefore much like Starbucks and IKEA, they needed to develop tools to help fill the gaps that result from their choices. The value of localisation was then built upon with the creation of the toolkits that target authenticity when localising, a challenge that was apparent through the findings chapters. The toolkits development and testing is reported on in Chapter 7.

- Through this research the challenges that the teams face when localising their spatial experiences around the world was also evidenced. This was evidenced via preliminary interviews and two case studies of Starbucks and IKEA. Interviews were conducted with seven professionals in the preliminary interviews and four professionals from Starbucks and five professionals from IKEA. The findings from the case studies highlighted that the designers try find other ways to gain inspiration in order to work around the issue of not always being able to travel to a specific location. Those who get to travel usually bring back local products for the rest of the team to try. Other participants suggested instead of reports and desktop research about a certain geographic context and setting, having a multi-sensory understanding would be beneficial. This helped lay the foundation and identify key ingredients that are needed to create the toolkits as part of the second aim relating to the second research question. The gap between the development of theoretical work around the subject and the implementation of the theories in practice was apparent through the literature review. Therefore, the method set out to

investigate the challenges that the teams working within global brands and translating the spatial experience into different geographic contexts and settings face. These challenges included budget, time, and team distribution related (the challenges faced are reported on in the findings – Chapter 4, 5, and 6). The toolkits developed therefore bridge the gap between theory and practice that has been a pattern that has been noticed through literature where researchers in experience design and management have noticed and have urged to be brought closer together (The toolkits are reported on in Chapter 7). The findings are classified in a way that can assist other brands and experience design teams in overcoming shared challenges when it comes to localising their spatial experiences (reported on in the conclusion – Chapter 8).

- Finally demonstrating potential toolkits that can be used to address all of the points found through the research such as the combination of disciplines, encouraging authentic localisation and keeping in mind the challenges and the key ingredients needed when localising spatial experiences was another major contribution of the research. This was done through a developing a prototype of the toolkits, and testing it in the context of Bahrain by allowing the students in Ahlia University to use it as a part of a module (Reported on in Chapter 7). The work reported in Chapter 7 highlighted that co-creative toolkits can be developed to help deliver the knowledge needed to the geographically distant teams in a manner that also aligns with the challenges that brand managers face in implementing and ensuring such knowledge is shared with the design team.

8.4. Limitations

The main subject group for the investigation was the people working under global brands and this added restrictions to the research particularly identifying potential participants and gaining their involvement. The subject group are typically very busy and under constraint, which made recruitment for research studies more challenging.

While an effort was made to include a representative sample of participants, it is acknowledged that the participant sample is only a small portion of global brands selected, as well as members within global brands, and such there are limits to the generalisability of the findings. Had the

opportunity been made available, it would have been preferred to include more case study brands with different organizational structures, and a wider range of expertise of those interviewed including more than just the retail design team in Starbucks for example.

Moreover, all research has an inherent bias. However, to maintain a reliable approach with this study, an audit trail consisting of full records of all activities, raw data, research notes, and details of the analysis process, was recorded and maintained for each stage of the project. In addition, the activities and the researcher's involvement to understand how the data was produced and how the research practice could be made more reliable, were continuously explained and questioned by the researcher, and with supervision. The data analysis was done with the support of supervisors, who acted in ways to question or challenge misunderstandings or unclear data coding and thematic analyses.

Moreover, validity is concerned with whether the researcher sees what they think they see, and whether the findings actually represent what they appear to represent (Robson, 2002; Flick, 2009). First, care was taken to design suitable studies that would provide data pertinent to the research objectives. For each study, the decisions were as explicit as possible, both the collection and the analysis were recorded along the way, in order to fully demonstrate how an interpretation of the data was reached. Furthermore, triangulation was used because multiple methods and different sources were employed. Opportunities were also sought to test and validate the research outputs throughout the research process. This occurred within the validation surveys for example, where more experts in the field were invited to reach a consensus on the collected data. Another form of validation was testing the toolkit by putting it to use in the workshop.

Moreover, decisions I had to make due to a sudden shift to a different mode of engagement due to the Covid-19 pandemic greatly impacted both me and the study. The alterations to my final study and data analysis means greater time is being spent on finalising that piece of work, owing to the more limited data collection I was able to conduct.

8.5. Recommendations for Future Work

The novelty and breadth of the topic, coupled with the time available for the project, have meant that it was not possible to fully pursue many of the research directions that arose during the project. The findings identified however, offer a detailed overview of the localisation of spatial experience within global brands, and can serve as a strong foundation for further research towards improving the processes, methods and tools used when localising spatial experience design. This section offers some recommendations for future work that were recognized in the course of the project.

One area for further developed is the research on localised experience design and their interrelations with other related fields such as cultural studies, or other areas of design.

Another area for further development is adding to the case studies of Starbucks and IKEA, with other case studies of global brands, especially those with different organisational structures, such as organisations that outsource design.

This research focused specifically on global brands. In a similar manner, local brands can also be looked at in order to understand how they balance global and local.

An additional area for development is that the creative toolkits developed could also be further refined and introduced to professionals in order to better understand their implications.

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Appendices

Appendix A: Ethics Approval

My Documents

Amendments

 Refresh

SUBMISSION ID	CREATED DATE TIME	CREATED BY	STATUS	DESCRIPTION	UPDATED DATE TIME	COORDIN...
No items to display.						

Submission

Submission Ref 9545
Status Approved
Submission Coordinator Sheng-feng Qin sheng-feng.qin@northumbria.ac.uk

Name  amani.alaali

Email a.alaali@northumbria.ac.uk

Faculty

Department

Submitting As

Externally Approved Note: ONLY tick this box if your project has already received full ethical approval from an external organisation

Module Level Approval Tick this box if staff and this submission refers to an entire module.

**** Only to be used for low or medium risk projects as categorised by the diagnostic risk question set ****

Module Code

Module Tutor

Titl...

Dep...

Em...

Research Supervisor Find Help

Clear

Titl...

Dep...

Em...

Ethical Risk Level

Click here to answer the ethical risk questions

Risk Level Conditions:

Your ethical risk is **medium**. Your research should only consist of one or more of the following:

- Non-vulnerable adults
- Non-sensitive personal data referring to a living individual
- Secondary data not in the public domain
- Environmental issues
- Commercially sensitive information

Your project proposal has some ethical implications and will be reviewed by one independent reviewer appointed by your Faculty Research Ethics Committee. Some factors to be considered include considering obtaining informed consent forms from organisations or people involved, permission to use data from the Data Controller, as well as confidentiality/anonymity issues.

Ethical Risk Diagnostic Questions and Responses ▼

Refresh

ID	QUESTION	ANSWER
<i>No items to display.</i>		

Co-investigators ▼

+ Add Edit ✗ Delete Save Refresh

NAME OF CO-INVESTIGATORS
<i>No items to display.</i>

G1: General Aims and Research Design (Mandatory) ▼

Title

Title of your research project

Enhancing synergies between brand management, experience design and local identities in light of globalisation.

Outline General Aims and Research Objectives

State your research aims/questions (maximum 500 words). This should provide the theoretical context within which the work is placed, and should include an evidence-based background, justification for the research, clearly stated hypotheses (if appropriate) and creative enquiry.

This research investigates the interrelations between brand management and experience design in the context of globalisation and local identities. The research is being conducted in order to develop a practical toolkit for designers to use when translating global brands into local contexts. The toolkit will aid brand identity and experience design in light of the evolving pressures of globalisation. However, the number of studies that examine the impact of globalisation on the design, development and adaptation of brands remains low, particularly in relation to the design of shop and commercial interiors.

This study is inspired by the tensions between globalisation and localised cultural identities. The flow across nations defined as 'globalisation' has two opposite effects on the global society. On one hand, there is no doubt that globalisation can eradicate some of our differences and create similar life patterns in areas around the world. Thus, Labes (2014) states, globalisation is feared by some because it is seen to homogenise different cultural realities, thereby erasing uniqueness.

On the other hand, instead of destroying cultural identity, globalisation and identity can go hand in hand, revealing the power of identity against the massive force of globalisation. Dogerlioglu-Demir & Tansuhaj (2011) noted that in many countries, local and global factors are combined in daily life. Globalisation led to the creation of global brands. Theodore Levitt (1983) declared that a global market for uniform products has emerged. He argued that companies should exploit and grow by selling standardised products all over the world.

However, more recently Holt et al. (2004) argued that it was time to rethink global branding. They argued that consumers in most countries had trouble relating to the generic products. Such 'glocal' strategies have ruled marketing ever since. Rather than ignore the global characters of their brand, a brand should learn to manage it. Thus, the emergence for the need for brand management.

Experience design can be used as a method to benefit brand managers in terms of emotionally engaging the consumer. Many leading global brands have realised the importance of adapting to local markets in terms of experience design including Starbucks. They abandoned their standardised stores and explain on their website 'Our new approach to store design means that our designers are looking at each store individually to ensure that it looks distinctively local. This represents a new level of coffeehouse comfort, meaning that no two Starbucks will ever be entirely the same.' (Starbucks, 2018).

Wittner et al. (2011) adds that, currently, as a result of globalisation, many designers struggle with identity, particularly in respect of striking a balance between their status as individual style as designers and their adherence to the latest global trends. Therefore, this study examines contemporary developments in the arena of interior design with the aim of developing tools that will aid brand identity and experience design in light of the evolving pressures of globalisation. The availability of empirical data will help designers overcome uncertainty about how to move forward, and these tools will equip them to do so.

The objectives of this research are: (1) To understand how global brands are represented in local contexts and how local brand identities are influenced by globalisation; (2) To examine contemporary developments in brand management and experience design and to explore in detail their interrelations; and (3) To develop tools that could enhance the design process when designing for brands and for better experiences.

In this initial stage of research, which is the basis for this ethics application, we will be focusing on the gathering of initial empirical research based on interviews and co-creative workshops with industry professionals such as brand managers, designers and marketers.

Dogerlioglu-Demir, K. & Tansuhaj, P., 2011. Global vs local brand perceptions among Thais and Turks. *Asia Pacific Journal of Marketing and Logistics*, 23(5), pp. 667-683.
Holt, D., Quelch, J. & Taylor, E., 2004. How Global Brand Compete. *Harvard Business Review*, Volume September, pp. 1-0.
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Wittner, Ben, T. & Sascha, 2011. *Arabesque: Graphic Design from the Arab World and Persia*. illustrated ed. California: Die Gestalten Verlag, 2008.

G2: Research Activities (Mandatory)

Please give a detailed description of your research activities

Please provide a description of the study design, methodology (e.g. quantitative, qualitative, practice based), the sampling strategy, methods of data collection (e.g. survey, interview, experiment, observation, participatory), and analysis. Do sensitive topics such as trauma, bereavement, drug use, child abuse, pornography, extremism or radicalisation inform the research? If so have these been fully addressed?

The methods are qualitative and will build on one another starting with interviews leading to co-creative workshops. Interviews and workshops will be conducted with professionals who work in global brands as brand managers, designers and marketers.

The interviews will be semi-structured in nature. They will begin with the general and then to the specifics moving between the individual and the company. Following this, the first half of the interviews they will be asked to talk about their job. This is to make them comfortable by adding their history and personal touch. The participants will then be asked to describe the brand, and how do they manage to develop that brand. The second half of the interviews will move onto discussing with participants their current practices, including the teams and expertise they need for this task, the methods they use, and describing day to day activities such as managing and running daily processes. They will also be asked if they have any initial suggestions as to what they think practitioners would need to make the complexity of translating the global brand into local environments smoother. We aim to interview 10-15 participants in total, using snowball sampling and the continued recruitment of new participants until data saturation is reached. The interviews will be conducted in person or via video conferencing (e.g. Skype) depending on the availability of the participants.

Following the completion of the interviews, a series of workshops will be conducted with professionals from similar backgrounds to those interviewed. Some may be the same people interviewed depending on their availability. Each workshop will include 10-15 participants. These workshops will be approximately four hours in length and will be broken down into four different activities. Activity 1 will be an introductory presentation that outlines the data gathered from the previous methods. Activity 2 will be a group brainstorming session to come up with solutions for problems found to be reoccurring in the process from the interviews and the results will be drawn up on a white board or a large poster by the researcher. This exercise will help give the participants a sense of what is coming up in the next exercise and will help start initial conversations. Activity 3 is where they will be broken up into smaller groups of 3-4 in order to choose one of the solutions and further develop it using a more detailed brainstorming session. Activity 4 is where participants will be asked to present their work to the rest of the group allowing questions at the end to encourage further discussions.

All of the workshops will be documented through audio recordings and transcribed by the lead researcher. Outcomes from the workshop will be photographed. The data will be analysed and a summary of the conclusions can be drawn by using constant comparison analysis.

Three major stages characterize the constant comparison analysis (Strauss & Corbin, 1998). During the first stage (i.e., open coding), the data are chunked into small units. The researcher attaches a descriptor, or code, to each of the units. Then, during the second stage these codes are grouped into categories. Finally, in the third and final stage (i.e., selective coding), the researcher develops one or more themes that express the content of each of the groups (Strauss & Corbin, 1998).

Strauss, A., & Corbin, J. (1998). Basics of qualitative research: Techniques and procedures for developing grounded theory. Thousand Oaks, CA: Sage.

M1: People and/or Personal Data

Tick if your work involves people and/or personal data?

Sample Groups

Provide details of the sample groups that will be involved in the study and include details of their location (whether recruited in the UK or from abroad) and any organisational affiliation. For most research studies, this will cover: the number of sample groups; the size of each sample group; the criteria that will be used to select the sample group(s) (e.g. gender, age, sexuality, health conditions). If the sample will include NHS staff or patients please state this clearly. If this is a pilot study and the composition of the sample has not yet been confirmed, please provide as many details as possible.

Participants will be professionals working in positions related to the research such as brand management, design and marketing. Position titles include store developers and designers, senior vice presidents of creative global design and innovation, creative directors, branding consultants, innovation managers, and PR and marketing executives. Contacting them and retrieving information about them will be done through information widely available to the public through their professional network so it does not breach any of their privacy. They will be both from the UK and abroad.

The companies that will be looked at are Starbucks and Aesop because they are leading global brands with hundreds of branches around the world. They successful in their adaptations and they include a large number of employees which will make recruiting possibilities more abundant. Therefore, the company will be contacted for written permission through the contact information available on their official websites. The regional contact might increase the chances of getting an answer as there is probably less traffic trying to contact them so that will be tried out first. Once the contact has been established the researcher will set up the co-creative workshop through the company. The researcher will provide flexible timings (outside working hours if preferred by the company) where the researcher will travel to the company's preferred location to conduct the workshop. For example Aesop's headquarter's are in London so if contact was established and Aesop accepted, the researcher can then travel to London to conduct the workshop ensuring the participants do not have to cover the cost of travelling. Companies that could also possibly be looked at if the first two choices do not wish to collaborate include IKEA, adidas, and McDonalds. Other companies will be added if the need arises.

Nature of data pertaining to Living Individuals

If you will be including personal data of living individuals, including still or moving images, please specify the nature of this data, and (if appropriate) include details of the relevant individuals who have provided permission to utilise this data, upload evidence of these permissions in the supporting documentation section.

Details of any Special Category Data - If you will be collecting data revealing racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership, data concerning health or data concerning a natural person's sex life or sexual orientation, please specify which categories you will be using.

The research will be fully explained in more detail by providing participants with the debrief sheet, which will be provided to them at least two days in advance of the interviews and workshops. Participants for the interviews will also be given a choice in terms of the method in which the interview is conducted. They will be able to select video conferencing or face to face interviews and it will be noted in the consent form.

The researcher will also fully explain the nature of the research at the start of the sessions. Should participants have any further questions the contact details of the researchers are available on the information sheet. Participants will be requested to return a copy of both their own completed consent form whilst retaining their own second copy for reference. Participants will only be considered to take part if their consent form is returned. If a participant withdraws after the research has been completed, the participants' data will be removed from any transcripts, analysis or write up resulting from the workshops.

Participants will be fully debriefed at the end of each interview, and again following the workshop session to explain the nature of the study, where they will also be asked explicitly if they have any questions about the research (and participants will of course be able to ask questions at any point of the research). Participants will also be given the opportunity to register their interest if they wish to be informed about the future developments of the research. Based on the findings of the session, a further 'debrief' sheet explaining the 'results' of the study will be produced for this purpose.

Finally, participants will be reassured that their participation is entirely voluntary, that they can withdraw at any time without providing reason and that their data can be destroyed if they wish. The consent form also includes the researchers' contact details should they have any further queries about the research.

Legal Basis for Processing: [Further guidance can be found here](#)

If you require further information, please contact the Data Protection Officer by emailing dp.officer@northumbria.ac.uk

Type a value

Recruitment

Describe the step by step process of how you will contact and recruit your research sample and name any organisations or groups that will be approached. Your recruitment strategy must be appropriate to the research study and the sensitivity of the subject area. You must have received written permission from any organisations or groups before you begin recruiting participants. Copies of draft requests for organisational consent must be included in the 'Supporting Documentary Evidence'. You must also provide copies of any recruitment emails/posters that will be used in your study.

Participants will be recruited through multiple avenues.

For the interviews, as participants are chosen by their job title rather than the company, the individuals will be directly contacted. The first recruitment approach will be via messages distributed via professional networks that are available publicly (e.g. LinkedIn). These initial messages will briefly introduce the nature of the research, who is conducting it, and how much time is involved in participating. Interested participants will be asked to respond directly to the researcher via email or a returned message. Participants will also be recruited using snowball sampling.

For the workshops, the company will be contacted for written permission and the workshop will be arranged at a timings suitable for them. The company might prefer a time of year that is less demanding so that the staff can take time out, or might prefer to conduct the workshop outside of working hours, therefore, the researcher will take that into consideration. The researcher will also travel to the location preferred by the company to illuminate the cost of funding the travel of participants.

Remuneration

Details of remuneration

Will you make any payment or remuneration to participants or their carers/consultees? If yes: Please provide details/justifications. Note that your Faculty may have specific guidelines on participant payments/payment rates etc and you should consult these where appropriate.

Type a value

Type of Consent

Informed Consent

Type of Consent Details

Please include copies of information sheets and consent forms in the 'G6: File Attachments' section. If the study involves participants who lack capacity to consent, procedures in line with sections 30-33 of the Mental Capacity Act will need to be put in place. If you are using alternative formats to provide information and /or record consent (e.g. images, video or audio recording), provide brief details and outline the justification for this approach and the uses to which it will be put:

Informed consent - debrief sheet and consent forms attached.

Researcher and Participant Safety Issues

If there any risks the research could cause any discomfort or distress to participants (physical, psychological or emotional) describe the measures that will be put in place to alleviate or minimise them. Please give detailsof the support that will be available for any participants who become distressed during their involvement with the research.

The risks that the participants might face include that they might reveal intellectual property unwittingly; or disclose commercially sensitive information; or be discussing bad practice or difficulties faced in work, which might not be good if their anonymity is compromised; or might not have permissions from their employers to participate in the research. However, the companies names will be unidentifiable in the interview phase if the work is to be published or present. While for the workshops written permission for the company itself will be obtained to protect the participants.

For the researcher risks include travelling abroad for the interviews. In addition, the data saved on laptop need to be kept safe.

Data Gathering Materials Used

Provide a detailed description of what the participants will be asked to do for the research study, including details about the process of data collection (e.g. completing how many interviews / assessments, when, for how long, with whom). Add any relevant documentation to the 'Supporting Documentary Evidence' section of this form.

Interviews - 30 minutes each.

Workshop 4 hours including 4 activities and a refreshments break.

Potential Ethical Issues

Please describe any potential ethical issues the project may have which are not covered above, and how you have sought to minimise these.

Briefly mentioned in the section of the safety issues, there might be potential ethical issues in the fear by organisations that the research might expose commercially sensitive data. In order to minimise these fears, the organisation and participants will be informed on information sheets with the intention of the researchers. If preferred the organisations will be anonymised in the publication.

M2: DBS Clearances Required

+ Add ✎ Edit ✖ Delete 💾 Save ↻ Refresh

Do not upload your DBS certificate to this system as this would be contravening General Data Protection Regulations.

Further information relating to DBS Clearance can be found in the Ethics and Governance Handbook using the link below

[Ethics and Governance Handbook](#)

******* All fields below relating to DBS certificates must be completed *******

NAME OF PERSON ON CERTIFICATE	TYPE OF DBS CLEARANCE	CERTIFICATE REFERENCE	ADULTS/CHILDREN	DATE OF DBS CERTIFICATE
-------------------------------	-----------------------	-----------------------	-----------------	-------------------------

(Add new row)

M3: Secondary Data

Tick if you will be using secondary data NOT in the public domain?

M4: Commercial Data

Tick if your work involves commercially sensitive data?

Commercial Data Source

Starbucks, Aesop

Commercial Supplier Terms

Starbucks Intellectual Property rules state:

Seller acknowledges that all rights of ownership of the Marks, Starbucks confidential information, and Starbucks Intellectual Property belongs exclusively to and inures to the benefit of Starbucks. Seller will not at any time acquire any rights, title or interest in the Marks, Starbucks confidential information, or Starbucks Intellectual Property. Seller agrees that it will not at any time contest the ownership or validity of any of the Marks, Starbucks confidential information, or Starbucks Intellectual Property, nor register or attempt to register any of the foregoing nor assist anyone else to do so, nor do anything that would jeopardize or diminish the Marks, Starbucks confidential information, or Starbucks Intellectual Property (Starbucks, 2014).

Aesop's Intellectual property rules states:

Intellectual Property & Copyright

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Aesop, 2018. Terms & Conditions. [Online]
Available at: <https://www.aesop.com/nz/r/terms>
[Accessed 15 May 2018].

Starbucks, 2014. Starbucks Standard Terms and Conditions of Purchase. [Online]
Available at: <https://www.starbucks.com/business/suppliers/standardtermsandconditions>
[Accessed 15 May 2018].

M5: Environmental Data

Tick if your work involves the collection of environmental data?

G3: Research Data Management Plan (Mandatory)

Anonymising Data (mandatory)

Describe the arrangements for anonymising data and if not appropriate explain why this is and how it is covered in the informed consent obtained.

Participants will be anonymised in all transcripts with a self-chosen pseudonym (fake name). Data made publicly available will be fully anonymised in accordance with the UK Data Protection Act. Participants will be referred to anonymously in publications arising from the project. Data that does not breach participants' confidentiality will be made available more widely upon request.

Storage Details (mandatory)

Describe the arrangements for the secure transport and storage of data collected and used during the study. You should explain what kind of storage you intend to use, e.g. cloud-based, portable hard drive, USB stick, and the protocols in place to keep the data secure.

If you have identified the requirement to collect 'Special category data', please specify any additional security arrangements you will use to keep this data secure.

Artefacts created during the workshops will be photographed. The audio data will only be viewed by members of the research team to get a better understanding of the activities carried out in the workshops. Data will be stored securely at Northumbria University, for a minimum of five years, at which point it will be destroyed/ Digital data will be encrypted and password-protected in secure storage. ta files will only be available to the research project team. Consent forms will be stored separately from the data and stored at a secure location at Northumbria University. Should any participant choose to withdraw from the study, all data referring to them will be immediately destroyed.

Retention and Disposal (mandatory)

I confirm that I will comply with the University's data retention schedule and guidance.

[Research Data Management link](#)

[General Data Protection Regulations including Data Protection link](#)

[Records Retention Schedule link](#)

G4: Research Project Timescale (Mandatory)

Proposed Start Date

01/08/2018



Proposed End Date

01/12/2018



G5: Additional Information

Externally Funded

External Funder



Please give details of your 'other' funder

Agresso Reference

Franchise Programme Organisation

Please give details of your franchise organisation

Type a value

NHS Involvement

Please give details of any NHS involvement

Type a value

Clinical Trial(s)

Please give details of any Clinical Trial(s)

Type a value

Medicinal Products

Please give details of any Medicinal Product(s)

G6: File Attachments



Additional files can be uploaded e.g. consent documentation, participant information sheet, etc.

Please note: It is best practice to combine all documents into one PDF (This avoids the reviewer having to op...

[Go To Attachments](#)

G7: Health and Safety (Mandatory)



- I confirm that I have read and understood the University's Health and Safety Policy.
- I confirm that I have read and understood the University's requirements for the mandatory completion of risk assessments in advance of any activity involving potential physical risk.
The University Health and Safety Policy can be accessed [here](#)
The University Risk Assessment Code of Practice can be accessed [here](#)

Please confirm either:

There are PHYSICAL risks associated with the research project work and I confirm that a risk assessment has been approved and attached to this ethics submission.

OR

I can confirm that there are no physical risks associated with this project and so no risk assessments are required.

Students requiring assistance with completing their risk assessment should get in touch with their supervisor or module tutor as the first point of contact. If further assistance is needed, the Faculty Technician can provide further guidance.

For more specific risk assessments (e.g. lab work), especially where the project is Medium or High risk, you are required to consult the Faculty Technical Manager; your Supervisor/Module Tutor will be able to put you in touch.

If you have any questions or concerns, please contact the University Health and Safety Team by emailing

CRHealthandSafety@northumbria.ac.uk

G8: Insurance (Mandatory) ▼

I have read and understood the University Insurance guidance document (link below):

[Insurance Guidance link](#)

If you think your activity may involve a High Risk rating or are unsure how to answer the statements - contact fi.insurance@northumbria.ac.uk with a copy of your research proposal for advice.

I confirm my work is covered by University Insurance. I confirm an insurance risk level of:

Medium ▼

If your insurance risk level is HIGH please attach details of exceptional insurance coverage:

[Click here to attach a file](#)

G9: Electronic Signature (Mandatory) ▼

I confirm my supervisor has reviewed the contents of this document

I confirm I have assessed the ethical risk level of my work correctly and answered the above sections as fully and accurately as possible.

Full Name

amani.alaali

Date

02 May 2018 14:37:06



PDF Version ▼

Create PDF

No items to display.

Log of any Ethical Incidents ▼

Log New Incident

INCIDENT...	CREATED DATE TIME	CREATOR NAME	COMPLAINANT DETAILS
-------------	-------------------	--------------	---------------------

No items to display.

Title and Objectives (see G1) ▼

+ Add  Save

Reviewer A:

Reviewer B:

e.g. Are the research question and/or study aims clear?

DATE	ROLE	COMMENT
13/06/2018	Reviewer A	Clear and succinct aims and objectives, and a good rationale.

Proposed Methodology and Analysis (see G2) ▼

+ Add  Save

Reviewer A:

Reviewer B:

*e.g. Is the design appropriate to the research question?
Are the methods of data analysis appropriate to the research question?*

DATE	ROLE	COMMENT
13/06/2018	Reviewer A	Although I have approved this section, I think the researcher needs to think more about the details of the "brain storming" sessions. More detail on specific techniques would have been useful and made the application more robust.
13/06/2018	Reviewer A	The people section mentioned that some of the participants would be from abroad. Has the funding of travel to attend the workshops be considered and resolved?
02/07/2018	PI	The workshops will be organised through the company (preferably in the companies facilities or near) so the researcher is the only one traveling.

Sample and Recruitment (see M1) ▼

+ Add  Save

Reviewer A:

Reviewer B:

*e.g. Is the sampling approach appropriate to the design?
Is the sample sufficient and achievable?
Is the process of recruitment clearly explained?
Are participants receiving payments for taking part, and if so is the payment appropriate?
If the DBS is ticked, has the appropriate information been included?*

DATE	ROLE	COMMENT
13/06/2018	Reviewer A	this section is clear, no anonymization of data is suggested which I presume is not relevant to this study and the nature of the data being collected.

Consent (see M1) ▼

+ Add  Save

Reviewer A:



Reviewer B:

*e.g. Is the approach to consent seeking clear?
Is consent from parents/ carers/ guardians required?*

Are all necessary recruitment and informed consent documentation included (e.g. letters of permission, letters of invitation)
 Is the information sheet adequate to ensure informed consent?
 Are the consent form(s) appropriate?

DATE	ROLE	COMMENT
13/06/2018	Reviewer A	You have clearly used a generic template for your consent form and debrief sheet. This is fine but you need to remove the aspects of the text that suggest this, e.g. 'Name of Supervisor (if relevant): Irini Pitsaki' remove if relevant. You info on the debrief form is quite long and dense consider editing it to make it more succinct. You mentioned an information sheet in the consent form but have not attached one to this application.
02/07/2018	PI	I have changed the forms as per comments and reattached the reviewed versions. Where I wrote information sheet, I meant debrief sheet. Sorry for the confusion.



Researcher and Participant Safety (see M1) ▼

 Add  Save

*e.g. Is there any risk of physical harm for the researcher(s) or the participants and if so what attempts have been made to alleviate or minimise them?
 Have Risk Assessments been referred to where appropriate?*

DATE	ROLE	COMMENT
No items to display.		

Research Activities (see G2-G8, M1-M5, H1-H5) ▼



 Add  Save

Reviewer A: Reviewer B:

*e.g. Are the research tasks described clearly?
 Do sensitive topics such as trauma, bereavement, drug use, child abuse, pornography or extremism/ radicalism inform the research? If so have these been fully addressed? (and we can use this to amend the information on risk levels on the form)Is there any risk that the tasks may cause psychological harm and if so what attempts have been made to alleviate or minimise them?*

DATE	ROLE	COMMENT
13/06/2018	Reviewer A	The topic of the study is clearly described and the subject is not sensitive beyond potential commercial sensitivity issues. These issues are recognized but the mitigation strategy is rather thin and needs further explanation.
02/07/2018	PI	I had added to the section where the strategy will be to get written consent from the companies directly for the workshops. I will also organise the workshops to be in the companies facilities if possible, or near their location to eliminate the travel issues. Therefore, only the researcher will have to travel to the destinations. In the interview phase the individuals will be directly contacted from a variety of different companies, while the workshop will be organised for each company separately through the company itself.

Data Management Plan (see G3) ▼



 Add  Save

Reviewer A: Reviewer B:

*e.g. Have sufficient steps been taken to ensure participant anonymity/confidentiality of data?
 Are the arrangements for data storage and disposal clearly outlined?
 Are these arrangements in line with University and/or the funding body requirements?*

DATE	ROLE	COMMENT
<i>No items to display.</i>		



File Attachments (see G6) ▼

 Add  Save

Please note: where file attachments have not been added because they are not required, please select Approve.

COMMENT BY	DATE	ROLE	COMMENT
<i>No items to display.</i>			

General Comments (see Help) ▼

 Add  Save

DATE	ROLE	COMMENT
<i>No items to display.</i>		

Appendix B: Interview Consent Forms and Debrief Sheet



**Northumbria
University**
NEWCASTLE

Project Title: Enhancing synergies between brand management and experience design in light of globalisation.

Principal Investigator: Amani Alaali

*please tick or initial
where applicable*

- I have carefully read and understood the Participant Information Sheet.
- I have had an opportunity to ask questions and discuss this study and I have received satisfactory answers.
- I understand I am free to withdraw from the study at any time, without having to give a reason for withdrawing, and without prejudice.
- I agree to take part in this study.

Signature of participant.....	Date.....
(NAME IN BLOCK LETTERS).....	
Signature of researcher.....	Date.....
(NAME IN BLOCK LETTERS).....	



**Northumbria
University**
NEWCASTLE

Project Title: Enhancing synergies between brand management and experience design in light of globalisation.

Principal Investigator: Amani Alaali

Please read and tick the box below.

The investigator has explained to me the nature of the study, and what is required from me. They have given me a debrief sheet providing me with their contact details. I understand I am free to withdraw from the study at any time, without having to give a reason for withdrawing, and without prejudice. I agree to provide information to the investigator and understand that my contribution will remain anonymous and confidential



TAPE RECORDINGS WILL BE TAKEN

Project title: Enhancing synergies between brand management and experience design in light of globalisation.

Principal Investigator: Amani Alaali

I hereby confirm that I give consent for the following recordings to be made:

Recording	Purpose	Consent
voice recordings	For transcribing purposes	

Clause A: I understand that other individuals may be exposed to the recording(s) and be asked to provide ratings/judgments. The outcome of such ratings/judgments will not be conveyed to me. My name or other personal information will never be associated with the recording(s).

Tick or initial the box to indicate your consent to Clause A

Clause B: I understand that the recording(s) may also be used for teaching/research purposes and may be presented to students/researchers in an educational/research context. My name or other personal information will never be associated with the recording(s).

Tick or initial the box to indicate your consent to Clause B

Clause C: I understand that the recording(s) may be published in an appropriate journal/textbook or on an appropriate Northumbria University webpage, **which would automatically mean that the recordings would potentially be available worldwide**. My name or other personal information will never be associated with the recording(s). I understand that I have the right to withdraw consent at any time prior to publication, but that once the recording(s) are in the public domain there may be no opportunity for the effective withdrawal of consent

Tick or initial the box to indicate your consent to Clause C

Signature of participant..... Date.....

Signature of researcher..... Date.....



Project Title: Enhancing synergies between brand management and experience design in light of globalisation.

Principal Investigator: Amani Alaali

Meeting Medium:

please tick or initial where applicable

In Person

Through Video Conferencing

Other requirements/preferences:

.....
.....
.....
.....

Signature of participant.....	Date.....
(NAME IN BLOCK LETTERS).....	
Signature of researcher.....	Date.....
(NAME IN BLOCK LETTERS).....	



**Northumbria
University**
NEWCASTLE

Participant code:

PARTICIPANT DEBRIEF

Name of Researcher: Amani Alaali

Name of Supervisor: Irini Pitsaki

Project Title: Enhancing synergies between brand management and experience design in light of globalisation.

1. What was the purpose of the project?

This research investigates the interrelations between brand management and experience design in the context of globalisation and local identities. The research is being conducted in order to develop a practical toolkit for designers to use when translating global brands into local contexts. The toolkit will aid brand identity and experience design in light of the evolving pressures of globalisation. However, the number of studies that examine the impact of globalisation on the design, development and adaptation of brands remains low, particularly in relation to the design of shop and commercial interiors.

Rather than ignore the global characters of their brand, a brand should learn to manage it. Thus, the emergence for the need for brand management.

Experience design can be used as a method to benefit brand managers in terms of emotionally engaging the consumer. Many leading global brands have realised the importance of adapting to local markets in terms of experience design including Starbucks. They abandoned their standardised stores and explain on their website 'Our new approach to store design means that our designers are looking at each store individually to ensure that it looks distinctively local. This represents a new level of coffeehouse comfort, meaning that no two Starbucks will ever be entirely the same.' (Starbucks, 2018).

Wittner et al. (2011) adds that, currently, as a result of globalisation, many designers struggle with identity, particularly in respect of striking a balance between their status as individual style as designers and their adherence to the latest global trends. Therefore, this study examines contemporary developments in the arena of experience design with the aim of developing tools that will aid brand identity and experience design in light of the evolving pressures of globalisation. The availability of empirical data will help designers overcome uncertainty about how to move forward, and these tools will equip them to do so.

References:

Holt, D., Quelch, J. & Taylor, E., 2004. How Global Brand Compete. Harvard Business Review, Volume September, pp. 1-0.

Levitt, T., 1983. The Globalization of Markets. Harvard Business Review, Volume May.

Wittner, Ben, T. & Sascha, 2011. Arabesque: Graphic Design from the Arab World and Persia. illustrated ed. California: Die Gestalten Verlag, 2008.

2. How will I find out about the results?

Once the study has been completed and the data analyzed (approximately 8 weeks after taking part), the researcher will email you a general summary of the results.

3. If I change my mind and wish to withdraw the information I have provided, how do I do this?

If you wish to withdraw your data then email the investigator named in the information sheet within 1 month of taking part and given them the code number that was allocated to you (this can be found on your debrief sheet). After this time it might not be possible to withdraw your data as it could already have been analysed.

The data collected in this study may also be published in scientific journals or presented at conferences. Information and data gathered during this research study will only be available to the research team identified in the information sheet.

All information and data gathered during this research will be stored in line with the Data Protection Act and will be destroyed 12 months following the conclusion of the study. If the research is published in a scientific journal it may be kept for longer before being destroyed. During that time the data may be used by members of the research team only for purposes appropriate to the research question, but at no point will your personal information or data be revealed. Insurance companies and employers will not be given any individual's personal information, nor any data provided by them, and nor will we allow access to the police, security services, social services, relatives or lawyers, unless forced to do so by the courts.

If you wish to receive feedback about the findings of this research study then please contact the researcher at a.alaali@northumbria.ac.uk

This study and its protocol have received full ethical approval from Faculty of Art, Design and Social Sciences Research Ethics Committee. If you require confirmation of this, or if you have any concerns or worries concerning this research, or if you wish to register a complaint, please contact the Chair of this Committee Prof Mark Blythe stating the title of the research project and the name of the researcher: Amani Alaali.

Appendix C: Sample Interview Transcript

Marketing Manager at IKEA, Gateshead (IK1)		
Time	Speaker	Audio
00:00	Researcher	Okay I will just start out with talking about your role and what you do.. So could you tell me what your work involves?
00:08	Participant 01	<p>Okay so.. I'm the marketing manager. The local marketing manager. Si the structure the way it works in IKEA is we have a UK and Ireland manager who oversees the entire organization in the UK and Ireland. Within obviously you would have a support marketing manager, so she would be the go to person so if I was looking for something, if I need some input I can go to her, but then every store in our market, we have an either marketing manager or a marketing leader depending on what the structure looks like. So, if it is a local marketing leader then they report kind of report into a CMA marketing manager which is the same for a marketing area. When you are in CMA which is a priority marketing like Gateshead then the structure is to have a marketing manager with a marketing specialist and I report it to the store manager but then I also report it to a service office. So the routine is quite complex but the reason being, that the local marketing manager can look at the local market and focus on the local market, so in terms of focusing on a perspective, the purpose of the service office is to take a generic brand awareness and a generic message of identity of the brand but I would then work on a very local aspect to understand the local consumer, you know if you are thinking of the profile of the local consumer and go for that and then bring it into the store, so that is what I would do. Then the local manager can divide into several things so we look at market intelligence, we look at IKEA family which is kind of your loyalty cup, I would look at external communication and then I would manage the team and then of course I would work in terms of the store because I sit on the management team so operationally I would support the store, so it is quite a diverse role, I would also take PR, I would also take any of the other elements related to the store, even though I would not be the total owner of social media I would take anything related to it, because any local social wise I would be the pointer for and I would try to coordinate that so it is quite a diverse role, in terms of like.. yeah</p>
02:30	Researcher	What does a typical day or week look like in your role?
02:34	Participant 01	<p>Oh. Wow. Never is the same so, if you think of a Monday, which is why I said Monday is the worst day for me, in terms of, we have a commercial meeting in the morning, so that is all of our commercial partners, so if IKEA you would have the sales manager, you would have a logistic manager, an IKEA food manager they are the commerciality of the store, what my purpose is, is to feed into that commerciality and to give it the direction, because obviously they know where they are going but I navigate them, so it is all strategy and all the things I help influence, to say this is what we are going after, so that this is the bit of my role from a marketing intelligence perspective, so this is what the market is doing, align it obviously to global, and this is the national strategy, and this is where the global store is and this is where we want to go, so it is very</p>

Marketing hierarchy

Typical days

Monday: managers meeting

Appendix D: Workshop Consent Forms



**Northumbria
University**
NEWCASTLE

Project Title: Enhancing synergies between brand management and experience design in light of globalisation.

Principal Investigator: Amani Alaali

*please tick or initial
where applicable*

I have carefully read and understood the Participant Information Sheet.

I have had an opportunity to ask questions and discuss this study and I have received satisfactory answers.

I understand I am free to withdraw from the study at any time, without having to give a reason for withdrawing, and without prejudice.

I agree to take part in this study.

I hereby confirm that I give consent for the following recordings to be made:

Recording	Purpose	Consent
voice recordings	For transcribing purposes	<input type="checkbox"/>
Photographs	For documentation purposes	<input type="checkbox"/>

Clause A: I understand that other individuals may be exposed to the recording(s) and be asked to provide ratings/judgments. The outcome of such ratings/judgments will not be conveyed to me. My name or other personal information will never be associated with the recording(s).

Tick or initial the box to indicate your consent to Clause A

Clause B: I understand that the recording(s) may also be used for teaching/research purposes and may be presented to students/researchers in an educational/research context. My name or other personal information will never be associated with the recording(s).

Tick or initial the box to indicate your consent to Clause B

Clause C: I understand that the recording(s) may be published in an appropriate journal/textbook or on an appropriate Northumbria University webpage, **which would automatically mean that the recordings would potentially be available worldwide**. My name or other personal information will never be associated with the recording(s). I understand that I have the right to withdraw consent at any time prior to publication, but that once the recording(s) are in the public domain there may be no opportunity for the effective withdrawal of consent

Tick or initial the box to indicate your consent to Clause C

Signature of participant..... Date.....

Signature of researcher..... Date.....



**Northumbria
University**
NEWCASTLE

Participant code:

PARTICIPANT DEBRIEF

Name of Researcher: Amani Alaali

Name of Supervisor: John Vines

Project Title: Enhancing synergies between brand management and experience design in light of globalisation.

1. What was the purpose of the project?

This research investigates the interrelations between brand management and experience design in the context of globalisation and local identities. The research is being conducted in order to develop a practical toolkit for designers to use when translating global brands into local contexts. The toolkit will aid brand identity and experience design in light of the evolving pressures of globalisation. However, the number of studies that examine the impact of globalisation on the design, development and adaptation of brands remains low, particularly in relation to the design of shop and commercial interiors.

This study is inspired by the tensions between globalisation and localised cultural identities. The flow across nations defined as 'globalisation' has two opposite effects on the global society. On one hand, there is no doubt that globalisation can eradicate some of our differences and create similar life patterns in areas around the world. Thus, Labes (2014) states, globalisation is feared by some because it is seen to homogenise different cultural realities, thereby erasing uniqueness.

On the other hand, instead of destroying cultural identity, globalisation and identity can go hand in hand, revealing the power of identity against the massive force of globalisation. Dogerlioglu-Demir & Tansuhaj (2011) noted that in many countries, local and global factors are combined in daily life.

Globalisation led to the creation of global brands. Theodore Levitt (1983) declared that a global market for uniform products has emerged. He argued that companies should exploit and grow by selling standardised products all over the world.

However, more recently Holt et al. (2004) argued that it was time to rethink global branding. They argued that consumers in most countries had trouble relating to the generic products. Such 'glocal' strategies have ruled marketing ever since.

Rather than ignore the global characters of their brand, a brand should learn to manage it.

Thus, the emergence for the need for brand management.

Experience design can be used as a method to benefit brand managers in terms of emotionally engaging the consumer. Many leading global brands have realised the importance of adapting to local markets in terms of experience design including Starbucks. They abandoned their standardised stores and explain on their website 'Our new approach to store design means that our designers are looking at each store individually to ensure that it looks distinctively local. This represents a new level of coffeehouse comfort, meaning that no two Starbucks will ever be entirely the same.' (Starbucks, 2018).

Wittner et al. (2011) adds that, currently, as a result of globalisation, many designers struggle with identity, particularly in respect of striking a balance between their status as individual style as designers and their adherence to the latest global trends. Therefore, this study examines contemporary developments in the arena of experience design with the aim of developing tools that will aid brand identity and experience design in light of the evolving pressures of globalisation. The availability of empirical data will help designers overcome uncertainty about how to move forward, and these tools will equip them to do so.

References:

Dogerlioglu-Demir, K. & Tansuhaj, P., 2011. Global vs local brand perceptions among Thais and Turks. *Asia Pacific Journal of Marketing and Logistics*, 23(5), pp. 667-683.

Holt, D., Quelch, J. & Taylor, E., 2004. How Global Brand Compete. *Harvard Business Review*, Volume September, pp. 1-0.

Labes, S., 2014. Globalization and Cultural Identity Dilemmas. *CES Working Papers*, 6(1), pp. 87-96.

Levitt, T., 1983. The Globalization of Markets. *Harvard Business Review*, Volume May.

Wittner, Ben, T. & Sascha, 2011. *Arabesque: Graphic Design from the Arab World and Persia*. illustrated ed. California: Die Gestalten Verlag, 2008.

2. How will I find out about the results?

Once the study has been completed and the data analyzed (approximately 8 weeks after taking part), the researcher will email you a general summary of the results.

3. If I change my mind and wish to withdraw the information I have provided, how do I do this?

If you wish to withdraw your data then email the investigator named in the information sheet within 1 month of taking part and given them the code number that was allocated to you (this can be found on your debrief sheet). After this time it might not be possible to withdraw your data as it could already have been analysed.

The data collected in this study may also be published in scientific journals or presented at conferences. Information and data gathered during this research study will only be available to the research team identified in the information sheet. Should the research be presented or published in any form, all data will be anonymous (i.e. your personal information or data will not be identifiable).

All information and data gathered during this research will be stored in line with the Data Protection Act and will be destroyed 12 months following the conclusion of the study. If the research is published in a scientific journal it may be kept for longer before being destroyed. During that time the data may be used by members of the research team only for purposes appropriate to the research question, but at no point will your personal information or data be revealed. Insurance companies and employers will not be given any individual's personal information, nor any data provided by them, and nor will we allow access to the police, security services, social services, relatives or lawyers, unless forced to do so by the courts.

If you wish to receive feedback about the findings of this research study then please contact the researcher at a.alaali@northumbria.ac.uk

This study and its protocol have received full ethical approval from Faculty of Art, Design and Social Sciences Research Ethics Committee. If you require confirmation of this, or if you have any concerns or worries concerning this research, or if you wish to register a complaint, please contact the Chair of this Committee Prof Mark Blythe stating the title of the research project and the name of the researcher: Amani Alaali.

The Brief

Aēsop.

'I was horrified at the thought of Aesop evolving into a soulless chain. I've always imagined what we do as the equivalent of a weighty, gold charm bracelet on the tanned wrist of a glamorous, well-read European woman who has travelled and collected interesting experiences.' - Aesop Founder

Client

Aesop - established in 1987. Headquartered in Melbourne, and has offices and stores in many parts of the world.

Objectives

Our objective has always been to formulate skin, hair and body care products of the finest quality; we investigate widely to source plant-based and laboratory-made ingredients, and use only those with a proven record of safety and efficacy. In each of our unique stores, informed consultants are pleased to introduce the Aesop range and to guide your selections.

A sincere interest in intelligent and sustainable design extends to every aspect of Aesop's workings. Just as meticulous research is integral to the formulation of each product, our utilitarian containers are created with utmost care to ensure they function with ease and are pleasing to our eyes.

In seeking new locations, our first consideration is to work with what already exists. It is our intention to weave ourselves into the fabric of place and add something of merit rather than impose a discordant presence, and our consistent practice to use a locally relevant design vocabulary.

Deliverables

- Phase 01 Concept Drawings
- Phase 02 Concept Drawings



The Site

Aēsop.

In 2002, listeners of Radio 4 voted for Grey Street as the “best street in the UK”

Location

Grey Steet, Newcastle Upon Tyne, UK.



Site

Grey St. OPTICIAN



Aēsop.

Store Design Guidelines

www.aesop.com

‘Order is the shape upon which beauty depends.’

Pearl S. Buck

AESOP ON DESIGN

In 2004 in an underground nook in the Melbourne bayside suburb of St Kilda, Aesop hosted our first in store customers . The space – once a narrow ramp descending into an underground car park – set the benchmark for future structural ambitions.

So when it was proposed to craft the ceiling of Aesop Adelaide from 7560 amber glass bottles, few eyebrows were raised. Nor did we shy away from the architectural challenge of constructing a store with

400,000 sheet of reclaimed copies of the New York Times in Nolita, or using 3000 cardboard boxes – the kind used to ship our products – in the assemblage of Aesop Finders Lane.

Our passionate interest in design extends to every aspects of Aesop’s operations – through to containers, labels and gift boxes. This is not simply about aesthetics for their own sake; we believe unequivocally that intelligent design can improve people’s lives.

Store Design Guidelines

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Design thinking
Design process
Sustainability
Materials
Material boards
Renders
Photography guidelines

III

Product specifications
POS requirements
Core retail zones
Testers and sinks

IV

Lighting
Acoustics
Ambience
Film screenings and projection
Art
Plants

V

Façade and window treatments
Exterior lighting and signage
Ceilings
Flooring of house storage
Back of house storage
Bathroom
Rubbish

VI

Electrical
Technology
Data and telephony
Exit signs
Fire extinguishers
Security system
Safe
Cleaning during construction
New store schedule
Conclusion

APPENDIX

A Sustainability of material guidelines
B Colour range
C Product category and SKU specifications
D Lighting guidelines
E Image referencing index
F Architectural details
G Build schedule
H Regional fixture specifications

Introduction

AESOP STORE DESIGN GUIDELINES

Why this document?

We first started designing Aesop stores in 2002. We went from zero to three stores in the first six months and have continued to grow since. Our thinking from the outset was to celebrate the neighborhood's and streetscapes that we inhabit. Wherever possible we have tried to retain original stone faces or improve ugly gestures that we have inherited so as to add something of aesthetic merit to the street for street front stores or to malls where this is applicable. Our interiors have always been designed by architects of distinction and have been treated as serious projects engineered to communicate and interact with our customers. Our design aesthetic has been directly influenced by seminal work in the *Praise of Shadows*, written by Junichiro Tanizaki. We also enjoy *Undesigning the Bath* by Leonard Koren and finally, like Crawford's important forward to *Sensual Living*, which extrapolates her studio's approach to humanistic and emotional design. We seek design solutions that are sincere, authentic and timeless. Intellectually engaging ideas communicated without pretension, expressing the necessary details, simplifying, reducing, refining. This document is the distillation of the key lessons and non-negotiables necessary to ensure the proper functioning of our stores across the globe. Before you even begin thinking of designing for Aesop it is critical that you understand our objectives, aesthetic sensitivities and functional requirements. We have outlined here in alphabetical order some of the attributes that make for great Aesop store design and we have that coupled with your exceptional professional skill, evolved communication and timely project management we will achieve a mutually gratifying result.

How to use this document?

Please ensure that this proprietary document is treated with respect and confidentiality and shared only with relevant designers in your team. Every entry in this document is included for a reason and we ask that you reference this throughout the design process to ensure that prior to submitting any design you carefully consider the requirements outlined below. This document is intended to address the design requirements relevant to:

- Aesop signature stores all street level
- Aesop signature stores in malls
- Aesop signature counters

PURPOSE OF STORES

What Aesop stores are

Retail environments

Ultimately the success and longevity of a store will be determined by the retail success of the store. We understand that good design can only do so much to influence this – however it is a factor that directly contributes to many of the details that determine success at a retail level including product display, ambiance of store, street visibility etc. As a retail environment it also means that on a daily basis the store be “working” – please acquaint yourself with our operations including how we serve out customer, process transactions, receive and manage stock, dispose of rubbish etc.

Pieces of work

Staff will be working in these stores five to seven days a week for most of the year. The store becomes their workshops and for people to be inspired and productive it needs to support their needs and be a piece that they look forward to working in through all seasons of the year.

Busy environments

Some stores can serve more than 500 customers a week or more than 150,000 customers a year This has a heavy toll on the store fixtures and fittings and we expect these to be able to cope with this volume of usage and not easily deteriorate or break down. Please pay particular attention to drawers, POS surfaces, lighting these and other surfaces that are going to be bumped, scratched or otherwise mishandled through the normal course of trade.

Public spaces

Stores must legally adhere to requirements for general public spaces and safety. This includes CH&S requirements for staff (e.g. ergonomics of POS, Store Accessibility).

What Aesop stores are not

Temporary

Unless specified differently, stores should be designed so that they will age gracefully with minimal maintenance and will still look strong and relevant in ten plus years.

PR and Marketing Projects

This publicity surrounding our store’s development is important and assist with announcing its presence to customers, however this is never the primary purpose of our stores. Stores are expected to all be profitable on standalone basis and no amount of design publicity makes up for a poorly performing store.

NINE UNRELATED INSPIRATIONS

These inspirations have been selected to provide an aesthetic proof that we feel appropriately references project and thinking that we hold in high esteem. We are not seeking to replicate these ideas but rather suggest that you use these images as a palate cleanser before beginning your Aesop project. We’re inspired by the tactility, materiality and respect for proportion that is expressed in these works.

1. Aalto House, Alvar Alton Munkkiniemi, Finland
2. Alexandria Librar, Snohetta Architects, Hamza Associates, Alexandria, Egypt
3. Boyd House, Robin Boyd. Melbourne Australia
4. Chandigarh High Court, Charles-Durward, India
5. Castercian Monastery of Novy Dvur, John Pawson Pisek, Czech Republic
6. Hooper House, Marcel Breuer, Baltimore County
7. Kaufmann Desert House, Richard Neutra, Palm Springs, California, USA
8. Niemeyer House, Oscar Niemeyer, Rio de Janeiro, Brazil
9. Schaulager, Herzog & de Meuron, Basel, Switzerland