



## Legacy Retail under Digital Disruption: Strategic Insights from National Book Store's Omnichannel Transition in the Philippines

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### Abstract

Legacy book and stationery retail remains structurally important in the Philippines because it supports access to learning materials, school supplies, and low-friction educational consumption across socio-economic segments. National Book Store, Inc. (NBS)—a long-established market leader—now operates in a rapidly shifting environment marked by accelerating e-commerce penetration, digital content substitution, platform-based price competition, and heightened consumer expectations for convenience and assortment transparency. This study examines NBS's strategic positioning and adaptive direction under digital disruption, with particular emphasis on its emerging omnichannel transition. A qualitative case study design is employed using secondary data drawn from government and industry reports, market analyses, academic sources, and credible public-facing materials. The analysis applies a structured strategic-analytics sequence combining PESTEL macroenvironment scanning, market and competitive assessment, and SWOT synthesis to surface capability strengths, structural constraints, and actionable opportunity spaces. Findings indicate that NBS's enduring advantages—brand salience, nationwide retail access, and a diversified learning-and-lifestyle assortment—continue to anchor its relevance. However, exposure to platform competition, operational frictions in product discovery and inventory experience, and category-level shifts toward digital consumption create vulnerabilities that require deliberate capability upgrading. The findings suggest that NBS's sustainability will depend on strengthening its digital customer experience, tightening omnichannel integration, and building partnership ecosystems with schools, publishers, and content providers to preserve trust and differentiation in a platform-dominated retail landscape.

**Keywords:** *National Book Store; legacy retail; digital disruption; omnichannel strategy; Philippine retail; strategic management; PESTEL; SWOT; dynamic capabilities*

### 1. Introduction

Retail access to books, learning materials, and school supplies remains a structurally significant component of educational participation and human capital formation in emerging economies. In the Philippine context—where public policy has continually emphasized basic education access, system financing, and learning-resource availability—private retail channels function as practical complements to formal education provision, particularly for households and schools managing procurement constraints and uneven distribution of instructional materials (Asian Development Bank, 2021; Department of Education, 2022). Within this landscape, National Book Store, Inc. (NBS) has long been recognized as the country's most prominent bookstore and school-and-office supply chain, with a legacy extending from its wartime-era origins to a multi-format retail presence that includes books, stationery, art

materials, and lifestyle-oriented merchandise (Wikipedia contributors, 2024; Esquire Philippines, 2023).

However, the strategic environment of book and educational retail has shifted substantially in the last decade. On the demand side, consumer behavior has been reshaped by (a) the steady diffusion of digital content consumption, (b) the convenience norms created by platform-based shopping, and (c) intensified price sensitivity under macroeconomic volatility. On the supply and competitive side, marketplace platforms have expanded assortment visibility and accelerated price comparison, while logistics integration has reduced the historical advantages of physical proximity—especially for standardized items such as basic stationery and common school supplies (Santos & Reyes, 2020; Philippine Statistics Authority, 2023). At the sector level, market estimates continue to indicate growth potential for books and related print categories, yet the fastest expansion trajectories are increasingly



associated with e-commerce channels and digitally enabled purchasing behavior (IndexBox, 2024; Philippine Statistics Authority, 2023). This environment creates a dual reality for incumbent retailers: physical stores remain valuable for immediacy, tactile browsing, and last-mile convenience, but the value proposition is progressively judged through omnichannel expectations—searchability, inventory transparency, fulfillment speed, and frictionless returns (Esquire Philippines, 2023; International Publishers Association, 2022).

For NBS, the implications are strategic rather than merely operational. The firm's scale, brand salience, and nationwide footprint offer resilience advantages, but these same legacy strengths can become constraints if the organization underinvests in digital customer experience, data-informed assortment optimization, or platform-integrated fulfillment models. In parallel, the book ecosystem includes persistent risks to trust and differentiation, particularly the circulation of counterfeit or pirated print and learning materials, which can undermine content integrity and weaken publisher–retailer relationships (Senate Economic Planning Office, 2020; International Publishers Association, 2022). These pressures are amplified by a competitive set that is no longer limited to direct bookstore rivals, but includes broad marketplaces, cross-border sellers, and digitally native channels that compete on price, discovery, and convenience (Philippine Statistics Authority, 2023; Santos & Reyes, 2020).

Existing work on digital disruption in Southeast Asian retail emphasizes that incumbents do not “lose” solely because digital entrants exist; they lose when organizational capabilities fail to evolve alongside shifting consumer expectations and platform economics (Santos & Reyes, 2020). However, integrative, case-based strategic analysis remains limited on how a dominant Philippine educational-retail incumbent can frame and execute an omnichannel transition while preserving its social and educational role. A structured strategic assessment of National Book Store is therefore developed to clarify environmental pressures, competitive dynamics, and capability priorities under intensifying digital disruption.

Specifically, the study aims to: (a) examine NBS's mission-oriented strategic intent and organizational priorities in relation to its legacy role in education retail; (b) analyze the macroenvironmental and market forces shaping

competitive conditions in Philippine book and school-supply retail; (c) evaluate internal strengths and weaknesses alongside external opportunities and threats through an integrated strategic synthesis; and (d) derive implications for sustaining relevance and competitiveness through omnichannel capability development under platform-driven disruption (Esquire Philippines, 2023; IndexBox, 2024; Philippine Statistics Authority, 2023).

The scope of analysis primarily covers the period 2020 to 2025, capturing post-pandemic shifts in consumer purchasing behavior, e-commerce expansion, and the accelerating normalization of hybrid (online–offline) purchasing patterns that have reshaped the strategic environment of Philippine retail (Philippine Statistics Authority, 2023; IndexBox, 2024).

## 2. Review of Related Literature

### 2.1 Omnichannel Integration and Digital Capability

Peer-reviewed studies generally converge on the conclusion that stronger omnichannel integration—particularly unified inventory visibility, click-and-collect, and cross-channel fulfillment—tends to improve customer satisfaction and, indirectly, purchase intention in retail settings. Evidence indicates that integration across product, price, promotion, information access, and customer service reduces perceived risk and strengthens satisfaction, which in turn increases purchase intention (Cattapan & Pongsakornrungrungsilp, 2022). Experimental work likewise shows that higher levels of offline-to-online channel integration enhance satisfaction and loyalty intentions, particularly when customers perceive channels as complementary rather than substitutive (Lazaris et al., 2021). Beyond satisfaction, channel integration quality also supports customer engagement, which is associated with positive word-of-mouth and repurchase intentions across both high- and low-involvement product categories (Lee et al., 2019). In addition, perceived logistics service quality, when aligned with channel integration quality, further improves transaction-specific satisfaction and repurchase intention (Prassida & Hsu, 2022).

At the same time, the literature also cautions against overly linear interpretations. While omnichannel strategies consistently strengthen satisfaction, their direct effect on repurchase intention is not uniformly robust; in several studies,



repurchase intention is better explained through mediation pathways such as satisfaction and perceived benefits (e.g., convenience, variety, value) (Astete-Meza et al., 2025; Fertansyah & Waluyo, 2025). Taken together, the empirical pattern supports a broadly positive relationship between omnichannel integration and consumer outcomes, with satisfaction functioning as a key mechanism.

A complementary strand of evidence suggests that AI-enabled interfaces can shape user satisfaction and perceived value through personalization, relevance, and analytics-based support. In education settings, Rao, Tian, and Atento (2025) reported positive user evaluations of AI tools for engagement, content relevance, and learning analytics, even as perceived direct effects on academic performance were more moderate. By implication, similar AI-enhanced interaction logic may extend to omnichannel retail contexts where personalized and adaptive experiences are increasingly expected. Case-based evidence from the Philippine context aligns with this strategic reading: Atento and Atento (2025) observed that Mercury Drug faced competitive pressure from digital-first platforms and identified acceleration of digital integration (including partnership ecosystems such as telehealth and e-prescriptions) as strategically necessary. Likewise, Teodosio et al. (2025) showed that a family-owned SME retailer could reposition itself as a solutions hub through digital engagement and customer-centric redesign, reducing vulnerability to price-driven rivalry. Taken together, these studies frame digital capability—whether AI-mediated or through broader omnichannel integration—as an increasingly salient prerequisite for sustaining relevance and loyalty (Atento & Atento, 2025; Rao et al., 2025; Teodosio et al., 2025).

## **2.2 Digital Disruption and Incumbent Performance**

Empirical research indicates that digital disruption, particularly via e-commerce platforms and digitally mediated retail ecosystems, can erode the sales base and competitive position of brick-and-mortar incumbents when digital transformation is delayed or fragmented. The rise of e-commerce has shifted core value creation away from physical shelf-based decision points toward digital interfaces and connected platforms, altering competitive authority over consumer choice and retailer influence (Reinartz et al., 2018). Evidence from grocery contexts further suggests that the entry of e-

grocery giants such as Amazon Fresh can produce measurable downstream pressures on local brick-and-mortar competitors, including sales declines and operational downsizing, with smaller firms experiencing disproportionate vulnerability (An & Chung, 2025). In response, the literature repeatedly emphasizes that incumbents must invest in digital and omnichannel strategies (e.g., mobile commerce, channel integration, customer-experience redesign) to reduce erosion of foot traffic, patronage, and market share (Ac, 2025; Justino et al., 2022; Sagar & Kaur, 2024). Failure to adapt tends to intensify exposure to consumer migration toward online channels that offer convenience, assortment visibility, and price comparison (Pandagre, 2025; Tiwari, 2023).

Sectoral case evidence from the Philippines is directionally consistent with this broader pattern. Atento and Atento (2025) identified digital-first platforms and counterfeit risks as explicit external threats to Mercury Drug and flagged relatively slower digital adoption as a strategic weakness. While the case does not quantify market-share loss, it documents a credible mechanism through which platform competition can weaken incumbents' positioning. Within Philippine telecommunications—an adjacent domain shaped by digital ecosystem competition—Dela Costa and Atento (2025) documented revenue resilience alongside margin pressures and leverage constraints amid intensified competition and fintech-enabled convergence. The analysis underscores how incumbents may face sustained market pressures even when pursuing ecosystem differentiation. Related IJHBA investment-focused analyses also illustrate how market sentiment can remain cautious in consumer-facing sectors despite identifiable fundamentals, reinforcing the broader point that strategic adaptation does not automatically translate into immediate performance relief or market repricing (Mangubat & Atento, 2025; Nona & Atento, 2025). Collectively, these findings support the conclusion that digital disruption can generate persistent competitive and financial pressures on incumbents, especially when digital transformation investments lag or fail to translate into improved customer value and profitability (Atento & Atento, 2025; Dela Costa & Atento, 2025).

## **2.3 Books/Print Substitution Effects**

Studies do not generally support a simple substitution narrative in which increased digital content consumption directly and consistently



reduces demand for physical books. Research on mass digitization via the Google Books project indicates that free or searchable digital distribution can increase demand for physical books by enabling discovery and stimulating purchases—particularly for less popular works that benefit from improved visibility (Nagaraj & Reimers, 2020; Nagaraj & Reimers, 2023). Related work also suggests that e-books and print books may function simultaneously as competing and complementary channels depending on usage context and genre. For instance, some evidence indicates stronger competition in casual-reading genres, yet digital channels may also complement print by strengthening discovery and pricing power rather than purely cannibalizing sales (Li, 2021). Qualitative evidence further highlights that readers choose modalities contextually: digital formats often support lighter, mobile, or multitasked reading, whereas print remains valued for immersion and sustained attention (Spjeldnæs & Karlsen, 2022). In library contexts, increasing digital resource use has been associated with reduced physical patronage, though this may reflect changing access patterns more than a uniform collapse of print demand (Abimajee, 2025). Overall, the literature suggests a complex relationship in which complementarity is common, while substitution may be conditional and segment-specific.

Within Philippine higher education, evidence of educational digitization provides a locally relevant basis for treating substitution as an empirical question rather than an assumed outcome. Atento (2025) documented broad adoption of e-learning platforms and blended learning modalities (with comparatively limited institutionalization of MOOCs), illustrating a structural shift in how instructional materials and learning interactions are accessed. While that study's focal concern is SDG integration in management education, the documented expansion of digital learning resources plausibly reduces reliance on traditional print textbooks in certain contexts, suggesting a potential substitution pathway that should be tested directly rather than inferred (Atento, 2025). In short, the international evidence leans toward complementarity, but local educational digitization trends warrant targeted investigation into where and how substitution may emerge (Atento, 2025; Nagaraj & Reimers, 2020, 2023).

#### **2.4 Trust/Counterfeit Risk in Marketplaces**

A substantial body of evidence indicates that counterfeit risk in online marketplaces is strongly associated with lower trust and weaker purchase/repurchase intentions, both through direct negative experiences and through heightened perceived risk. Scenario-based experimental evidence on deceptive counterfeits shows that receiving a counterfeit product substantially reduces trust in the retailer and, for large online or omnichannel retailers, this trust erosion reduces repurchase intention on the platform (Peinkofer & Jin, 2022). The same evidence base suggests that a counterfeit incident can cause consumers to avoid the retailer altogether, potentially pushing authenticity-seeking buyers away from that channel over time (Peinkofer & Jin, 2022). Consistent with this mechanism, a meta-analytic synthesis of e-commerce purchasing determinants finds that perceived risk has a strong negative effect on purchase decisions, while trust is a strong positive predictor of online buying behavior across contexts (Handoyo, 2024). Together, these findings imply that counterfeit prevalence damages legitimate commerce not only via fraud itself but also via broader trust and risk dynamics that depress purchase likelihood.

Asia- and Southeast Asia-relevant literature supports the importance of counterfeit risks as both commercial and regulatory problems. Studies spanning China and other Asian markets report that counterfeits generate financial and reputational harm to brands, and that perceived risks—including fear of deception—shape purchasing intentions and decision avoidance (Chand & Fei, 2020; Dahlia, 2023; Harun et al., 2019; Tseng et al., 2020; Wu et al., 2020). Legal and policy analyses comparing Indonesia and Singapore emphasize that counterfeit proliferation undermines consumer confidence and motivates stronger marketplace responsibility and authenticity safeguards (Khaerudin et al., 2025; Purnama et al., 2025). In parallel, conceptual and technical work on blockchain traceability in cross-border e-commerce is explicitly motivated by the premise that counterfeits harm brand equity and undermine trust in e-commerce platforms, thereby justifying traceability mechanisms as trust-restoration infrastructure (Lee & Yeon, 2021; Li et al., 2024). Overall, across experimental, meta-analytic, policy, and technical studies, the relationship between counterfeit exposure and reduced trust/purchase intention is consistently supported.



Philippine case evidence further indicates that legitimate incumbents treat counterfeit presence as a strategic threat rather than a peripheral regulatory concern. Atento and Atento (2025) explicitly listed counterfeit drugs in informal markets as a threat to Mercury Drug in their SWOT analysis, implying perceived damage to trust and brand equity even without direct measurement of purchase-intention effects. This reinforces the broader literature's implication that counterfeit prevalence can weaken legitimate retailers' market position and that future empirical work should test the trust and purchase-intention effects directly in local marketplace contexts (Atento & Atento, 2025; Handoyo, 2024; Peinkofer & Jin, 2022).

### 2.5 Synthesis of Literature

Across the four focal domains, the literature converges on a general strategic logic: legacy retailers face digitally mediated competitive pressures that increasingly shift value creation toward integrated customer journeys, trusted transactions, and platform-informed convenience, yet the magnitude and direction of outcomes depend on category dynamics and mediating mechanisms.

First, evidence on omnichannel capability is comparatively consistent in identifying channel integration quality (e.g., unified inventory visibility, cross-channel fulfillment, coherent information access, and service consistency) as a robust predictor of customer satisfaction, engagement, and downstream behavioral intentions (Cattapan & Pongsakornrungrungsilp, 2022; Lazaris et al., 2021; Lee et al., 2019; Prassida & Hsu, 2022). However, the literature also signals that repurchase intention is often indirect—frequently mediated by satisfaction and perceived consumer benefits such as convenience and variety—rather than a guaranteed direct effect of omnichannel strategies (Astete-Meza et al., 2025; Fertansyah & Waluyo, 2025). In short, omnichannel integration is a capability lever that reliably strengthens evaluative outcomes (satisfaction), while behavioral persistence (retention/repurchase) may require benefit realization and friction removal.

Second, the literature on digital disruption and incumbent performance provides a coherent warning: when e-commerce platforms shift consumer choice architecture and reduce search costs, incumbents that do not invest in digital transformation are exposed to declining foot traffic, weakening patronage, and competitive erosion (Reinartz et al., 2018; Tiwari, 2023; Pandagre, 2025). Empirical evidence in grocery suggests

platform entrants can generate measurable negative spillovers for local brick-and-mortar competitors (An & Chung, 2025), while adoption frameworks emphasize the need for organizational fit and enabling conditions to support mobile commerce and omnichannel upgrades (Justino et al., 2022). Strategy prescriptions in applied retail research similarly argue that survival increasingly requires integrated digital strategies rather than purely store-based competition (Ac, 2025; Sagar & Kaur, 2024). Philippine case-oriented evidence aligns with this logic: Mercury Drug's strategic analysis identifies digital-first platforms as threats and slower digital adoption as a weakness, implying vulnerability mechanisms consistent with disruption theory (Atento & Atento, 2025). Adjacent ecosystem dynamics in telecommunications further highlight how digital convergence can intensify competitive pressure and market discipline even amid strategic repositioning (Dela Costa & Atento, 2025).

Third, the literature on books/print substitution is more nuanced and does not support a universal displacement model. The Google Books evidence suggests digitization can increase demand for physical books through discovery effects and expanded visibility, especially for less popular titles (Nagaraj & Reimers, 2020, 2023). Channel research likewise indicates that digital and physical formats may function as complementary pathways depending on genre, usage setting, and price/channel strategies (Li, 2021; Spjeldnæs & Karlsen, 2022). At the same time, institutional contexts (e.g., libraries) show shifting usage patterns toward digital access that can reduce physical patronage, albeit without implying uniform market collapse for print (Abimajee, 2025). Philippine higher education digitization trends—documented in e-learning and blended modality adoption—reinforce the plausibility of context-specific substitution effects in academic markets, while still requiring direct testing rather than assumption (Atento, 2025).

Fourth, the evidence on trust and counterfeit risk is comparatively strong in linking counterfeit exposure to trust erosion and weakened (re)purchase intentions in online marketplaces. Experimental results demonstrate sharp drops in retailer trust following counterfeit experiences and measurable reductions in repurchase intention (Peinkofer & Jin, 2022). Meta-analytic evidence supports the broader mechanism: perceived risk depresses online purchase decisions, while trust is a consistent positive predictor of e-commerce buying behavior (Handoyo, 2024). Asia-focused studies and policy analyses further frame counterfeits as threats to



brand equity and platform confidence, motivating both regulatory accountability and technical safeguards such as blockchain traceability (Chand & Fei, 2020; Dahlia, 2023; Harun et al., 2019; Khaerudin et al., 2025; Lee & Yeon, 2021; Li et al., 2024; Purnama et al., 2025; Tseng et al., 2020; Wu et al., 2020). Philippine case evidence also treats counterfeit risk as strategically material for incumbents, reinforcing that legitimacy and trust are commercial assets under platform competition (Atento & Atento, 2025).

Taken together, the literature implies that the sustainability of legacy retail under digital disruption depends on (a) capability upgrading toward omnichannel integration, (b) converting integration into realized consumer benefits that generate retention, (c) recognizing category-specific dynamics of digital substitution vs complementarity, and (d) protecting trust through authenticity safeguards—particularly in platform-mediated purchase environments (An & Chung, 2025; Astete-Meza et al., 2025; Handoyo, 2024; Nagaraj & Reimers, 2023; Peinkofer & Jin, 2022; Reinartz et al., 2018).

## 2.6 Research Gaps

Despite strong directional evidence, several gaps remain material—particularly for a National Book Store-type legacy retailer operating in the Philippines.

- a. Limited Philippines-specific empirical tests of omnichannel mechanisms.

While omnichannel integration is strongly associated with satisfaction, the literature repeatedly suggests that repurchase intention is often mediated by satisfaction and perceived benefits (Astete-Meza et al., 2025; Fertansyah & Waluyo, 2025). However, there is limited context-specific evidence for how these mediation pathways operate in Philippine retail settings and in mixed-category assortments (books, stationery, lifestyle items), where shopping goals and involvement levels vary (Lee et al., 2019; Lazaris et al., 2021).

- b. Under-specification of capability bundles for incumbents under platform pressure.

Disruption literature emphasizes that digital transformation is necessary to mitigate performance erosion (Reinartz et al., 2018; Tiwari, 2023), yet applied studies often remain at the “strategy recommendation” level without specifying which capability bundles (e.g., logistics service quality +

integration quality; engagement + service redesign) most effectively stabilize incumbent performance in practice (Justino et al., 2022; Prassida & Hsu, 2022). Case-based Philippine evidence highlights threats and strategic needs (Atento & Atento, 2025) but does not empirically isolate which capability investments yield the largest competitive returns.

- c. Mixed evidence on print-digital substitution warrants category- and context-specific testing.

Print substitution effects appear contingent and sometimes complementary (Li, 2021; Nagaraj & Reimers, 2020, 2023; Spjeldnæs & Karlsen, 2022). Philippine higher education trends show expanding digital learning adoption (Atento, 2025), but the net effect on demand for physical books and school supplies—especially in education-linked retail ecosystems—remains insufficiently tested. This is particularly relevant for retailers whose historical advantage rests on physical distribution and in-store browsing.

- d. Trust/counterfeit effects are well-supported but insufficiently localized to mainstream, non-luxury retail categories.

Strong experimental and meta-analytic evidence links counterfeit experiences to trust erosion and reduced repurchase intention (Handoyo, 2024; Peinkofer & Jin, 2022). However, many Asia-focused studies concentrate on luxury or specific product classes (Chand & Fei, 2020; Dahlia, 2023; Tseng et al., 2020), while policy/legal analyses emphasize liability and protection frameworks (Khaerudin et al., 2025; Purnama et al., 2025). There is a gap in examining how counterfeit prevalence affects trust and purchase decisions in everyday education-related goods (e.g., school supplies, printed learning materials), and how this shapes consumers’ channel choices between marketplaces and reputable incumbents (Atento & Atento, 2025).

- e. AI-enabled personalization is discussed as valuable, but its role in omnichannel retail retention remains under-linked.

Evidence from AI adoption in education suggests AI tools can raise perceived value and engagement (Rao et al., 2025), but the translation of AI-driven personalization into retail outcomes—especially as a complement to channel integration—remains underdeveloped in the current synthesis. For legacy retailers, the relevant question is not simply AI adoption, but whether AI-mediated



interfaces strengthen satisfaction and retention beyond the baseline gains from integration quality.

- f. Need for integrative case-based synthesis that is decision-oriented for a Philippine legacy retailer.

Existing Philippine cases demonstrate disruption pressures and strategic imperatives in different industries (Atento & Atento, 2025; Dela Costa & Atento, 2025) and show digital transformation logic for SMEs (Teodosio et al., 2025). However, there remains a gap for an integrative, decision-oriented analysis that applies structured frameworks (PESTEL–market analysis–SWOT) to a legacy education-retail incumbent, translating literature-backed mechanisms into a coherent omnichannel capability roadmap.

### 3. Methodology

#### 3.1 Research Design

A qualitative, secondary-data case study design is employed to examine National Book Store, Inc. (NBS) as a legacy retailer navigating digital disruption and the shift toward omnichannel retailing in the Philippines. The design fits an explanatory and diagnostic objective—interpreting environmental pressures, competitive dynamics, and strategic capability implications for a single focal organization—rather than estimating population parameters through primary survey measurement.

#### 3.2 Data Sources and Evidence Base

Data were drawn from publicly available, document-based sources already listed in the reference list. These sources were selected to represent complementary vantage points on the case:

- a. Policy and education-sector context used to situate the structural role of learning-material retail in the Philippine setting (Asian Development Bank, 2021; Department of Education, 2022).
- b. Official or quasi-official market/e-commerce context used to describe national e-commerce trends and purchasing-channel shifts (Philippine Statistics Authority, 2023).
- c. Market intelligence and forecast materials used to characterize category-level size, growth, and projected trajectories (IndexBox, 2024).

- d. Industry ecosystem reports used to frame publishing-system risks relevant to product integrity, trust, and institutional relationships (International Publishers Association, 2022; Senate Economic Planning Office, 2020).
- e. Firm-facing public accounts and journalistic reporting used to contextualize NBS's adjustments and strategic moves (Esquire Philippines, 2023; Philstar Global, 2008).
- f. Peer-reviewed academic framing used to situate the case under the logic of digital disruption and incumbent adaptation within Southeast Asian retail (Santos & Reyes, 2020).
- g. Descriptive background material used only for basic historical and definitional context (Wikipedia contributors, 2024).

#### 3.3 Inclusion and Screening Logic

Sources were included if they met all of the following criteria:

- a. Direct relevance to (a) NBS as an organization, (b) Philippine retail and e-commerce dynamics, (c) book/publishing ecosystem conditions, or (d) education-sector demand conditions affecting learning-material acquisition.
- b. Sufficient credibility for its function in the analysis (e.g., PSA for e-commerce statistics; DepEd/ADB for education context; industry reports for ecosystem issues).
- c. Recency and contextual fit for disruption-era interpretation (primarily 2020–2024), while allowing limited older sources only when they contributed unique corporate background information (e.g., Philstar Global, 2008).

Where sources contained quantitative claims (e.g., market values or projections), such figures were treated as reported indicators attributable to the issuing source rather than independently re-estimated by the study.

#### 3.4 Analytical Framework and Procedures

Analysis followed a staged strategic-analytics sequence consistent with business case research:



- a. Case orientation and strategic intent mapping. The firm's mission-oriented positioning and stated priorities were summarized to establish the strategic baseline against which disruption pressures are interpreted.
- b. PESTEL macroenvironment scanning. Document evidence was categorized into Political, Economic, Social, Technological, Environmental, and Legal drivers shaping retail conditions and consumer behavior. The intent was to identify exogenous pressures and enabling conditions affecting NBS's operating model (e.g., platform diffusion, purchasing-channel shifts, regulatory and ecosystem issues).
- c. Market and competitive assessment. Evidence on market structure, e-commerce acceleration, and competitive pressure from marketplaces and substitutes was synthesized to clarify where NBS's legacy advantages remain material and where platform economics erode differentiation (Philippine Statistics Authority, 2023; IndexBox, 2024; Santos & Reyes, 2020).
- d. SWOT synthesis. Findings from the external scan and market assessment were integrated with firm-level observations to derive Strengths, Weaknesses, Opportunities, and Threats as a decision-oriented summary for strategic implication building.
- e. Implication extraction for omnichannel transition. The concluding analytic step translated the SWOT and environment/market findings into capability priorities (e.g., digital customer experience, inventory transparency, channel integration, partnership ecosystem strengthening), keeping claims proportional to the underlying documentary evidence.

### 3.5 Credibility and Trustworthiness Procedures

Given the secondary-data nature of the study, credibility was supported through:

- a. Source triangulation by function: key claims were checked for consistency across source types (official statistics vs.

market forecasts vs. industry reports vs. firm-facing accounts).

- b. Role-bounded use of sources: sources were used only within their strongest evidentiary role (e.g., PSA for e-commerce context, DepEd/ADB for education system context, industry reports for ecosystem integrity issues).
- c. Traceable synthesis: the Results section is structured to maintain a clear audit trail from PESTEL evidence → market dynamics → SWOT outputs → strategic implications.

### 3.6 Ethical Considerations

No human participants were involved and no private or proprietary datasets were used. All inputs were derived from publicly accessible sources, and attribution is maintained through in-text citations and a complete reference list.

## 4. Results and Discussion

### 4.1 Strategic Orientation and Organizational Priorities

National Book Store, Inc. (NBS) is positioned as a long-established Philippine retail incumbent whose core identity is anchored on education-linked consumption, spanning books, school and office supplies, art materials, and selected lifestyle merchandise (Esquire Philippines, 2023; Wikipedia contributors, 2024). Its mission—"bringing the best of books, stationery, and supplies to Filipinos"—reflects an accessibility-oriented value proposition aligned with its historical role as a primary retail channel for learners, educators, and professionals (Esquire Philippines, 2023; Wikipedia contributors, 2024).

Strategic direction is increasingly defined by the need to operate as an omnichannel learning-and-lifestyle retailer, emphasizing strengthened digital interfaces, customer engagement mechanisms (including loyalty initiatives), and store concept expansion beyond a traditional "bookstore-only" format (Esquire Philippines, 2023). The strategic intent implied by these priorities includes: sustaining brand leadership in education retail, scaling e-commerce performance, broadening assortments into learning kits and digital-adjacent items,



strengthening partnerships with schools and publishers, and improving operational efficiency through store and systems modernization (Esquire Philippines, 2023; Philippine Statistics Authority, 2023).

Historical accounts of NBS's evolution from its founding era to national expansion establish incumbency context and provide baseline indicators of organizational scale and continuity (Philstar Global, 2008; Wikipedia contributors, 2024). Market intelligence sources further situate this incumbency within a retail environment where the Philippine books/printed matter market shows continued demand potential while e-commerce growth intensifies competitive pressure and reshapes purchasing expectations (IndexBox, 2024; Philippine Statistics Authority, 2023).

#### **4.2 Macroenvironment Conditions (PESTEL)**

**Political.** Education-sector policy direction and public investment in learning access remain structural demand supports for learning materials and school supply consumption. At the same time, shifts toward open educational resources and digitally mediated learning tools potentially reduce long-run dependence on printed textbooks, creating demand risk for print-intensive categories (Asian Development Bank, 2021; Department of Education, 2022).

**Economic.** Inflationary pressures, currency volatility, and interest-rate movements constrain discretionary and semi-essential spending and increase consumer sensitivity to price and convenience. In addition, exposure to imported inputs (paper, ink, and foreign-published materials) can affect pricing stability and inventory planning. Despite these constraints, demographic and middle-class consumption dynamics remain supportive of continued education-linked purchasing, contingent on affordability and perceived value (IndexBox, 2024; Philippine Statistics Authority, 2023).

**Social.** Education, creativity, and self-development retain strong cultural salience, sustaining baseline demand for books and learning-related goods. Concurrently, reading and learning behaviors increasingly incorporate mobile-based consumption, audiobooks, and short-form digital formats—especially among younger cohorts. Social media-mediated hobby trends (e.g., journaling, calligraphy, crafting) also reinforce demand for art materials and creative supplies, supporting category

diversification beyond print (Esquire Philippines, 2023).

**Technological.** The diffusion of mobile connectivity, digital payments, and logistics capabilities has accelerated e-commerce normalization and intensified expectations for searchability, inventory transparency, and reliable fulfillment. Competitive viability increasingly depends on digital customer experience quality and channel integration rather than physical presence alone (Philippine Statistics Authority, 2023; Santos & Reyes, 2020).

**Environmental.** Sustainability expectations associated with packaging, paper sourcing, and waste management are growing reputational considerations for retailers with substantial paper and packaging footprints. While regulatory enforcement is uneven, environmental expectations are increasingly salient in consumer evaluation and may shape brand preference, particularly among younger segments.

**Legal.** Compliance considerations include taxation, e-commerce regulation, data privacy, and intellectual property protection. Piracy and counterfeit goods constitute both legal and commercial risks that can weaken legitimate distribution channels and undermine consumer trust—risks that become more consequential as retail activity expands across online marketplaces and digital channels (International Publishers Association, 2022; Senate Economic Planning Office, 2020).

#### **4.3 Market and Competitive Dynamics**

NBS operates in a heterogeneous demand environment that includes basic education and higher education consumers, educators, professionals, hobbyists, and small enterprises purchasing office and learning supplies. Reported nationwide footprint—frequently cited as over 230 branches—supports broad physical accessibility, including areas where bookstore options are limited (Esquire Philippines, 2023; Wikipedia contributors, 2024).

Market structure has been reshaped by platform-based retail competition. Major marketplaces have increased price transparency, expanded accessible assortment, and strengthened delivery convenience, shifting consumer expectations regarding speed, variety, and ease of product discovery (Philippine Statistics Authority, 2023; Santos & Reyes, 2020). NBS has responded



by participating in major e-commerce platforms and developing its own digital presence; however, competitive pressure increasingly concentrates on the quality of digital experience and the consistency of omnichannel service delivery, including inventory visibility, discovery ease, and customer support responsiveness (Esquire Philippines, 2023; Philippine Statistics Authority, 2023).

Competitive risk is also shaped by product-integrity concerns. Piracy and counterfeit items—particularly in online channels—introduce authenticity uncertainty that can depress consumer confidence and distort price competition. In this environment, reputational association with legitimacy and authenticity becomes a potential differentiator for established retailers, provided that trust signals are made visible and operationalized in the customer journey (International Publishers Association, 2022; Senate Economic Planning Office, 2020).

Generational divergence further complicates market dynamics: some segments retain preference for physical formats and store-based purchasing, while younger cohorts demonstrate higher adoption of digital discovery and digital consumption tools. Diversification into learning kits, creative supplies, and digital-adjacent products reflects adaptive alignment with these evolving consumption patterns and adjacent demand pockets (Esquire Philippines, 2023).

#### 4.4 SWOT Synthesis

**Strengths.** NBS's principal strengths include recognized brand salience, nationwide accessibility (commonly reported as 230+ branches), diversified assortment across education and lifestyle-linked categories, and affordability positioning for budget-conscious segments. Multichannel presence, including participation in major e-commerce platforms, also broadens reach beyond purely physical channels (Esquire Philippines, 2023; Wikipedia contributors, 2024).

**Weaknesses.** Vulnerabilities include domestic-market confinement, exposure to category-level pressures associated with shifts in reading and learning behavior, and persistent operational frictions that affect product discovery and in-store navigation. These weaknesses imply needs in inventory systems, layout optimization, and tighter digital integration to reduce search and transaction friction (Philippine Statistics Authority, 2023; Santos & Reyes, 2020).

**Opportunities.** Opportunity spaces include strengthening the digital ecosystem (website/app usability and customer journey design), expanding penetration in underserved provincial markets, and deepening partnerships with schools and publishers to reinforce relevance and differentiation. Market outlook indicators also support continued demand potential for books and printed matter while signaling expanding e-commerce participation, reinforcing the strategic importance of omnichannel capability building (Esquire Philippines, 2023; IndexBox, 2024).

**Threats.** Major threats include platform-based price competition, macroeconomic volatility affecting discretionary spending, generational shifts toward digital consumption patterns, and piracy/counterfeit proliferation that undermines legitimate commerce and weakens trust in retail channels (International Publishers Association, 2022; Senate Economic Planning Office, 2020).

#### 4.5 Discussion of Findings

##### 4.5.1 Omnichannel integration as a satisfaction and retention mechanism

The analysis indicates that NBS's competitive challenge is not digital presence per se, but the quality of omnichannel integration. Omnichannel research consistently shows that integration across channels—particularly in information access, service consistency, and channel complementarity—strengthens customer satisfaction and loyalty intentions (Lazaris et al., 2021; Lee et al., 2019). This mechanism is directly relevant to NBS's need to improve its digital interface and reduce friction in product discovery and availability certainty. When integration improves perceived risk conditions and enhances satisfaction, purchase intention increases primarily through satisfaction-based pathways (Cattapan & Pongsakornrungsilp, 2022).

However, the literature also suggests that repeat purchasing is not a guaranteed direct outcome of omnichannel strategies. Repurchase intention often depends on mediation through satisfaction and perceived consumer benefits such as convenience, variety, and reduced transaction friction (Astete-Meza et al., 2025; Fertansyah & Waluyo, 2025). This implies that NBS's omnichannel roadmap should be evaluated in terms of whether integration is translated into visible consumer benefits—e.g., reliable inventory visibility, reduced search effort, consistent service, and fulfillment dependability—



rather than measured only by the existence of online channels (Prassida & Hsu, 2022).

#### *4.5.2 Digital disruption reframes competition around platforms and choice architecture*

Competitive conditions in Philippine retail increasingly reflect platform-mediated choice, where consumer decisions are shaped by price comparison, assortment visibility, and logistics convenience. Digital transformation scholarship argues that disruption shifts the retail value chain by relocating value capture from store-based decision points to digitally mediated interfaces (Reinartz et al., 2018). In this environment, physical footprint alone becomes a weaker differentiator because digital channels reduce search costs and intensify price competition, particularly for standardized goods.

Empirical evidence from grocery retail further supports the inference that large-scale e-commerce entrants can impose measurable negative impacts on local brick-and-mortar competitors, especially where incumbents do not rapidly develop digital capabilities (An & Chung, 2025). Broader applied research similarly emphasizes that brick-and-mortar retailers increasingly require coherent digital strategies—omnichannel integration, mobile commerce readiness, and experience redesign—to mitigate erosion of patronage and market share (Ac, 2025; Justino et al., 2022; Sagar & Kaur, 2024; Pandagre, 2025; Tiwari, 2023). Accordingly, NBS's sustainability depends on its ability to operate effectively within platform-shaped competition while preserving the advantages associated with legitimacy, accessibility, and curated education-linked assortments.

#### *4.5.3 Print–digital dynamics are contingent, but education digitization increases selective displacement risk*

The evidence base does not support a deterministic conclusion that rising digital content consumption inevitably reduces physical book demand. Digitization can increase discovery and stimulate demand for physical works, especially for less visible titles (Nagaraj & Reimers, 2020, 2023). Channel research also indicates that print and digital formats may operate as differentiated channels with context-dependent complementarity rather than uniform cannibalization (Li, 2021; Spjeldnæs & Karlsen, 2022). This suggests that NBS should not assume a generalized collapse of print demand; instead, strategic attention should focus on how

consumer journeys increasingly begin digitally even when conversion may occur offline.

At the same time, institutional digitization trends in Philippine higher education—documented through expanded e-learning and blended modalities—provide a plausible pathway for selective substitution, particularly for academic markets where digital resources become standard instructional infrastructure (Atento, 2025). This raises a category-level implication: NBS's diversification into learning kits, creative supplies, and digital-adjacent goods can be interpreted as a rational hedge against segment-specific declines in print-dependent demand while maintaining relevance to learning and creativity consumption (Atento, 2025; Li, 2021).

#### *4.5.4 Trust and authenticity as differentiators under marketplace risk*

Counterfeit and pirated goods function as commercial threats because they undermine trust and distort price competition. Experimental evidence shows that counterfeit receipt sharply reduces trust in the retailer and decreases repurchase intention on that platform (Peinkofer & Jin, 2022). Meta-analytic evidence reinforces the mechanism: perceived risk depresses online purchase decisions, while trust strongly predicts buying behavior (Handoyo, 2024). In Asian markets, counterfeit prevalence is repeatedly linked to reputational harm and consumer confidence risks, motivating legal accountability and technical safeguards such as traceability systems (Chand & Fei, 2020; Dahlia, 2023; Harun et al., 2019; Khaerudin et al., 2025; Lee & Yeon, 2021; Li et al., 2024; Purnama et al., 2025; Tseng et al., 2020; Wu et al., 2020).

For NBS, the implication is that trust can operate as a differentiator only if it is operationalized through visible authenticity cues, transparent sourcing, and responsive customer support across channels. Under platform competition, legitimacy is not merely reputational; it becomes a value proposition that can counteract marketplace risk—provided the omnichannel experience also delivers convenience and reliability (Handoyo, 2024; Peinkofer & Jin, 2022).

#### *4.5.5 Integrated implication: capability bundling rather than single-tool adoption*

Taken together, the findings support an interpretation centered on capability bundling: NBS's competitive resilience under disruption depends on the joint effectiveness of (a) channel



integration quality, (b) logistics/service reliability, (c) trust assurance against counterfeit risks, and (d) category portfolio adaptation to shifting learning and consumption patterns. Omnichannel research supports the combined role of integration and logistics service quality in shaping satisfaction and repurchase intention (Prassida & Hsu, 2022), while disruption research underscores that digital transformation must be embedded in the retail value chain rather than treated as an auxiliary channel (Reinartz et al., 2018). Consequently, the key strategic risk is not the absence of online presence, but uneven integration quality that fails to translate into benefits strong enough to offset platform convenience and price competition (Astete-Meza et al., 2025; Fertansyah & Waluyo, 2025).

## 5. Conclusions and Recommendations

### 5.1 Conclusions

This study examined National Book Store's strategic position as a legacy Philippine retailer operating under intensifying digital disruption and platform-mediated competition. The analysis indicates that NBS retains durable advantages rooted in brand salience, nationwide accessibility, and a diversified education-linked assortment that continues to serve broad consumer segments (Esquire Philippines, 2023; Wikipedia contributors, 2024). These strengths remain strategically material because learning and creativity consumption retains social importance, and physical stores still provide immediacy, browsing value, and localized access that platforms do not fully replace (Esquire Philippines, 2023; Spjeldnæs & Karlsen, 2022).

At the same time, competitive pressure is increasingly shaped by e-commerce choice architectures that elevate convenience, price transparency, assortment visibility, and fulfillment reliability as baseline expectations (Philippine Statistics Authority, 2023; Reinartz et al., 2018). In this environment, NBS's sustainability depends less on the existence of online channels and more on the quality of omnichannel integration that converts legacy scale into customer-perceived benefits, particularly reduced search and transaction friction and consistent cross-channel service delivery (Cattapan & Pongsakornrungrungsilp, 2022; Lazaris et al., 2021; Prassida & Hsu, 2022). Furthermore, category-level dynamics in books and learning materials are not deterministically substitutive; digitization can increase discovery and complement print, but institutional digitization in education

systems plausibly increases selective displacement risk in academic submarkets, reinforcing the need for portfolio adaptation (Atento, 2025; Nagaraj & Reimers, 2020, 2023).

Finally, trust and authenticity emerge as a strategic dimension under marketplace expansion. Evidence consistently links counterfeit exposure to trust erosion and weaker repurchase intentions, implying that legitimacy can be a differentiator for established retailers—provided that authenticity assurance is operationalized and made visible in the omnichannel customer journey (Handoyo, 2024; Peinkofer & Jin, 2022). Taken together, the conclusions support a capability-bundling view: NBS's competitive resilience under disruption depends on integrated capability development across channel integration, service/logistics reliability, trust assurance, and category portfolio evolution (Prassida & Hsu, 2022; Reinartz et al., 2018).

### 5.2 Recommendations

1. Strengthen omnichannel integration as a measurable capability program.

Prioritize unified inventory visibility, consistent pricing and promotions across channels, and frictionless cross-channel fulfillment options (e.g., click-and-collect, ship-from-store, and standardized returns). Omnichannel integration should be treated as a satisfaction mechanism and monitored through customer journey metrics rather than treated as a marketing add-on (Cattapan & Pongsakornrungrungsilp, 2022; Lazaris et al., 2021; Prassida & Hsu, 2022).

2. Upgrade digital customer experience to reduce search and discovery friction.

Improve search accuracy, category structure, recommendations, and product information quality so that the online journey approximates the confidence and clarity of in-store browsing. Engagement features (e.g., loyalty integration, personalized offers) should be used to translate convenience and variety into repurchase intention through satisfaction pathways (Astete-Meza et al., 2025; Fertansyah & Waluyo, 2025; Lee et al., 2019).

3. Compete strategically against platforms by emphasizing curated value and service reliability.

Since platforms often dominate on price comparison and breadth of assortment, NBS should



compete on curated learning solutions (bundles, school kits, teacher packs), service responsiveness, and fulfillment reliability that reduce perceived risk and increase confidence in purchase decisions (Reinartz et al., 2018; Philippine Statistics Authority, 2023).

4. Deepen institutional partnerships with schools, publishers, and content providers.

Develop structured partnership programs (e.g., school procurement channels, bundled learning kits, co-branded educational campaigns, and publisher collaborations) to reinforce educational positioning and reduce vulnerability to purely price-led platform competition. This recommendation is consistent with the opportunity to strengthen school- and publisher-linked differentiation identified in the strategic orientation and SWOT evidence base (Esquire Philippines, 2023).

5. Institutionalize authenticity assurance and anti-counterfeit trust signals.

Integrate authenticity cues in product pages, seller identity assurance (for marketplace channels), transparent sourcing disclosures, and responsive dispute resolution. These trust mechanisms should be treated as commercial protections because counterfeit exposure is empirically linked to reduced trust and repurchase intention (Handoyo, 2024; Peinkofer & Jin, 2022). Policy and traceability developments in Asia suggest that stronger safeguards are increasingly expected and strategically justified (Khaerudin et al., 2025; Lee & Yeon, 2021; Purnama et al., 2025).

6. Adapt the product portfolio to selective print substitution risks while leveraging complementarity.

Maintain print categories where discovery effects and immersive preferences support demand, while scaling growth categories aligned to learning-by-doing and creativity consumption (learning kits, art materials, hobby products). In academic-linked segments, track and respond to institutional digitization trends that may reduce dependence on print textbooks, particularly where blended learning becomes standard (Atento, 2025; Nagaraj & Reimers, 2023; Spjeldnæs & Karlsen, 2022).

7. Develop a phased implementation roadmap with operational accountability.

Implement changes through sequenced phases (e.g., foundational digital UX and inventory

visibility → fulfillment integration → trust assurance and customer engagement). Adoption frameworks emphasize organizational readiness and alignment as conditions for successful digital integration (Justino et al., 2022; Sagar & Kaur, 2024).

### 5.3 Implications

#### 5.3.1 Managerial and Strategic Implications

For legacy Philippine retailers, the NBS case indicates that resilience under disruption requires shifting from store-centric advantage to experience-centric and integration-centric advantage. Omnichannel integration quality becomes a core strategic asset because it mediates satisfaction and shapes retention outcomes, especially in environments where platforms reduce consumer switching costs (Cattapan & Pongsakornrungsilp, 2022; Lazaris et al., 2021; Reinartz et al., 2018). Managers should therefore view digital transformation not as a discrete channel initiative, but as an enterprise capability program integrating merchandising, inventory, service operations, and customer engagement (Prassida & Hsu, 2022).

#### 5.3.2 Industry and Policy Implications

The synthesis underscores that counterfeit and piracy risks are not only regulatory issues but also market-structure issues that shape trust and legitimate commerce. Policy and legal discussions in Asia highlight increasing pressure for marketplace accountability and authenticity safeguards, suggesting that stronger compliance and traceability mechanisms may become baseline requirements for platform retail ecosystems (Khaerudin et al., 2025; Purnama et al., 2025). For the publishing ecosystem, sustained legitimacy and IP protection are essential to maintaining incentives for creators and publishers and to protecting consumers from deceptive transactions (International Publishers Association, 2022; Senate Economic Planning Office, 2020).

#### 5.3.3 Consumer and Educational Implications

Education digitization trends imply that retail demand for learning materials may evolve unevenly across segments. While digitization can complement print through discovery effects (Nagaraj & Reimers, 2020, 2023), institutional uptake of blended learning can reduce dependence on print in specific academic contexts (Atento, 2025). Retailers serving education-linked markets therefore need segmentation-aware strategies that preserve access



and affordability while integrating digital convenience and evolving learning modalities.

#### 5.3.4 Research Implications

Future research should test the mediation pathways suggested by omnichannel literature in Philippine retail contexts (e.g., channel integration → satisfaction → repurchase intention), evaluate how authenticity assurance moderates trust and purchase intentions under marketplace exposure, and examine segment-specific print substitution effects in education-linked consumption environments (Astete-Meza et al., 2025; Fertansyah & Waluyo, 2025; Handoyo, 2024; Peinkofer & Jin, 2022). Comparative case work across Philippine legacy retailers could also identify which capability bundles produce the strongest resilience effects under platform competition (Prassida & Hsu, 2022; Reinartz et al., 2018).

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