DO SALES MECHANISMS PAY OFF?
EVIDENCE FROM A SYSTEMATIC LITERATURE REVIEW

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ABSTRACT

This study aims to understand how cross-selling, upselling and add-on selling, respectively, impact sales and revenue. In pursuit of this research objective, we conduct a systematic literature review encompassing 147 papers published between 2000 and 2024 from two databases: Web of Science and SCOPUS. We identify an overall positive relationship between the three sales mechanisms (i.e., cross-selling, upselling and add-on selling) and performance outcomes, including sales, revenue, and profitability. We also find that while all three mechanisms positively influence sales outcomes, they do so through distinct pathways. Cross-selling is most effective when supported by targeted promotions and in-store strategies; upselling benefits from personalized, emotionally resonant messaging; and add-on selling yields higher returns when tailored to loyal customers and adapted to product complexity.

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Introduction

The use of in-store sales mechanisms such as cross-selling, upselling, and add-on selling is a long-standing strategic practice in retail (Reinartz et al., 2008; Xu et al. 2023), with potential implications for both immediate sales outcomes and long-term customer value. These tactics are commonly employed to increase the average transaction size, improve profitability, and enhance the overall shopping experience. Over the past two decades, a growing body of academic research has examined how customer behaviors and perceptions can be influenced through these mechanisms and the resultant effects on business performance (e.g., sales and revenue).

Despite this growing interest, there remains a lack of a focused, systematic literature review that compiles, compares, and synthesizes the academic findings on the application and impact of these sales techniques. Most existing studies (e.g., Brush et al., 2012; Itani et al., 2023; Xu et al. 2023) tend to explore these mechanisms in isolation, with limited integration of insights across different sales strategies or customer outcomes. This fragmentation makes it difficult for both scholars and practitioners to develop a holistic understanding of how cross-selling, upselling, and add-on selling work individually and in relation to one another.

To address this gap, the current research project conducts a comprehensive and systematic review of the literature to consolidate insights and evaluate the effects of these sales mechanisms across various customer and performance outcomes. Specifically, it seeks to answer two key research questions: *(1) primarily, how do cross-selling, upselling, and add-on selling mechanisms influence incremental sales and revenue? and (2) secondarily, how do these mechanisms affect customer behavior*

and perceptions, particularly purchase intent, satisfaction, loyalty, and customer lifetime value?

What are **sales mechanisms?**

Cross-selling

Cross-selling refers to selling of additional items to a customer in relation to the item(s) that the customer has purchased *(*Ahn, *2012)*. Cross-selling includes both within category and across category cross-selling. An example of within category cross-selling is consumers purchasing groceries (chocolate and soft drinks) from a retail chain they have patronaged for groceries in the past, an example of across category cross-sell is a customer purchasing banking or fuel services from a retail chain where they have previously purchased chocolate and soft drinks *(Nenycz-Thiel and Romaniuk , 2019)*.

Upselling

Up-selling is a process through which a customer is persuaded (usually by a salesman) to purchase an upgrade of the item, which he/she intends to purchase (Wong et.al., 2012). In our literature review set, the word "up-selling" made the most appearance when it comes to the context of time-limited promotions. An example of such is hotels providing room upgrading through an online bidding system (Singha et.al, 2024) and airline companies selling unsold premium cabin seats to economy class customers via seat bidding services before departure (Flores and Prasetyo, 2024).

Add-on

Add-on selling is the process of persuading customers to purchase a product or service that can enhance the functionality or quality of a base

product (Basten and Ongena, 2024; Bošković et al., 2024; Kim and Tanford, 2016). Add-on products can be offered either concurrently with the base product at the time of its purchase or during the lifecycle of an already purchased base product (Jang and Chung, 2021). An example of add-on items being purchased together with a base product is in the travel industry, where hotel bookings aim to sell add-ons such as a rental car or spa service to enhance the customer experience of the base product (Kim and Tanford, 2016). Another example of add-ons sold during the product lifecycle of a base product is mobile game add-ons, where game patrons are introduced to more and more add-ons to enhance gameplay over the product lifecycle (Jang and Chung, 2021).

Methodology

Data and Sample

The literature search involves a systematic approach using Web of Science (WOS) and SCOPUS. These two databases are considered to include both the most pioneering and up-to-date peer-reviewed academic publications. The search strategy uses the keywords related to the three sales mechanisms, such as "upselling," "cross-selling," and "add-ons," with terms like “store,” “brick-and-mortar,” “online,” “ecommerce,” “promotion*,” and “merchandise*”. Filters refine the search to include only peer-reviewed articles published in English within the fields of business, management, and accounting from 2000 to 2024. Initial searches yielded 112 papers from WOS and 103 from SCOPUS. Following a structured, iterative title screening process, 49 overlapping papers were identified across the two databases.

The study further establishes clear inclusion and exclusion criteria. Articles focusing on in-store sales mechanisms in retail contexts and those published in reputable academic journals will be included.

Studies without empirical data, those unrelated to the retail sector, and articles published in languages other than English will be excluded. The selection process follows the PRISMA framework (Moher et al. 2009), beginning with a title and abstract review, followed by a full-text assessment to ensure alignment with the inclusion criteria. Relevant variables, such as definitions of sales mechanisms, outcomes, and methodological details, will be coded using a standardized scheme. In the end, 147 relevant papers are retained as the final sample for the analysis. For more details, please see Appendix A.

Quality Assessment

The quality of the included studies is assessed using a standardized risk-of-bias framework, adapted from the SBU's QUICKSTAR approach (Wartenberg et al., 2025). This involves evaluating study design, sample size, measurement validity, and potential conflicts of interest.

The risk-of-bias assessment follows a multi-step procedure:

1. Applying well-documented inclusion criteria to ensure clarity of the research question.
2. Screening titles and abstracts independently by two trained research assistants, followed by full-text reviews. Discrepancies are resolved through a structured consensus process. The inter-coder agreement reached 92%, indicating a high level of consistency in evaluations.
3. Assessing the risk of bias in primary studies using validated tools such as ROBINS-I or RoB 2. A random sample of articles is independently verified by a second reviewer to ensure reliability across assessments.

Results from studies deemed to have a high risk of bias are excluded from the synthesis or stratified by bias level to maintain the reliability of conclusions.

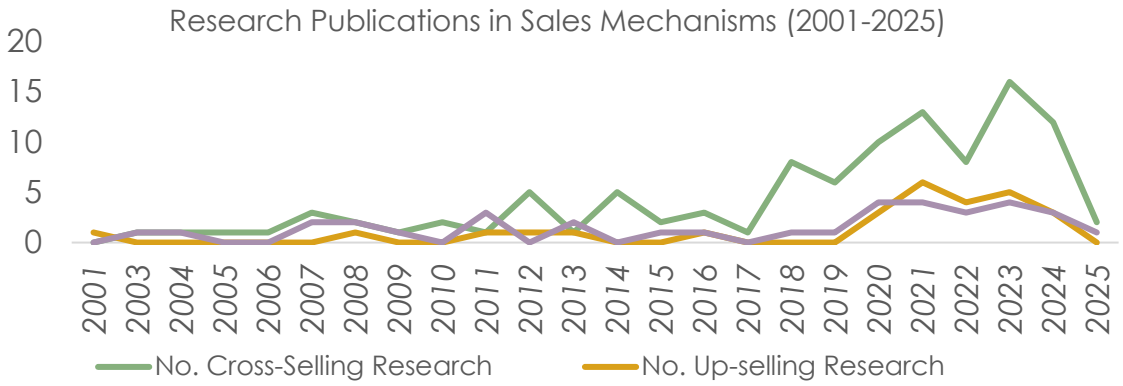
Analysis, Synthesis and Results Presentation

Overall View

The analysis involves a narrative synthesis to summarize findings from individual studies, highlighting commonalities and differences in the definitions of sales mechanisms, measurement scales, and, most notably their impact on key outcomes. Primarily, the focus is on incremental sales and revenue; secondarily, the synthesis explores effects on customer behaviour and perceptions, including purchase intent, satisfaction, loyalty, and customer lifetime value.

Overall, cross-selling was the most studied mechanism in the articles of this literature review (n=105); followed by add-ons (n=35); and up-selling (n=27). Figure 1 shows the development of research over the years. It can be seen that most of the research used in this study was recent (2018-2024). In what follows, we will detail the specific analysis results for each of the sales mechanims.

Figure 1: Research Publications in Sales Mechanisms (2001-2025)



Cross-selling Analysis

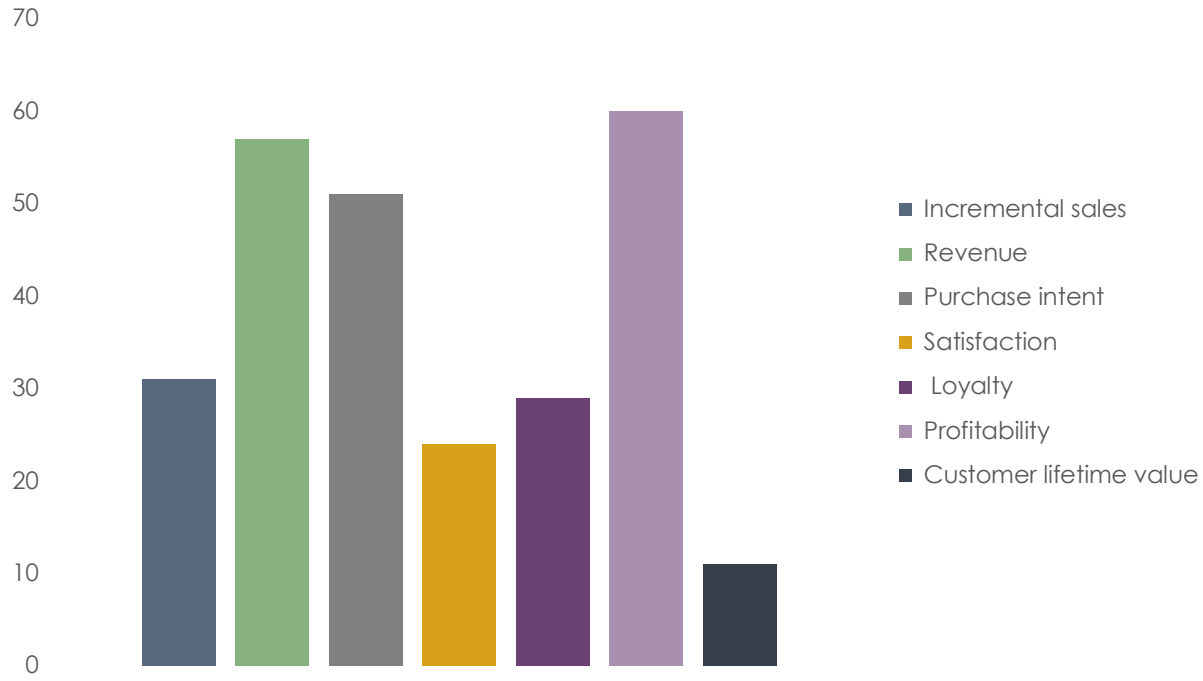
Overall, cross-selling is the most studied sales mechanism in the reviewed literature (n= 105) Definition wise, the concept of cross-selling was sometimes used alongside upselling for the same purchasing behaviour

(Aydin et.al, 2008, Urban and Russell, 2024), as in "cross/upselling behaviours refer to efforts directed at generating more value from customers by upgrading them to more profitable offerings" (Johnson and Friend, 2015). Narayanam et al. (2014) segmented cross-buying into first and second variant, the former requesting a prior purchase and the latter does not.

Measurement-wise, cross selling is commonly measured through a factor of cross-purchase intent of consumers. In special cases, cross-selling is measured by "lift" (Ahn, 2012) given that another item has been previously purchased, and Zheng et al. (2024) and Yang and Ji (2022) measured cross selling as items resold after returns under the context of return logistics.

As displayed in Figure 2, a majority of articles implied a positive relation between cross-selling and incremental sales, revenue, and profitability. Cross-selling promotions such as coupons and bundled selling adds profit to existing items (Feng et.al., 2022; Zhu and Lin, 2016), increase customers' willingness to pay (Goshal et al., 2021), and increases customer loyalty (Behera et.al., 2020). Furthermore, cross-selling moderate profit and revenue by raising switching costs for customers, thus increasing customer loyalty for that retailer (Jhang-Li and Chiang, 2024), Merchandising through the right choice of assortment increases customer satisfaction (Goic et.al, 2021) and loyalty (Katsifou et.al., 2014), targeted cross-selling assortment to the right demographic group impacts loyalty and purchase intent (Madani et.al., 2021), and improved product placement not only incentivizes transactions and increases product turnover (Nguyen et.al., 2019), but can also be effective in increasing customer satisfaction (Sah et.al, 2019). The Empirical methods used in the reviewed literature include regression analysis (30%), data mining (17%), and surveys and questionnaires (14%).

Figure 2: The Impacts of Cross-selling

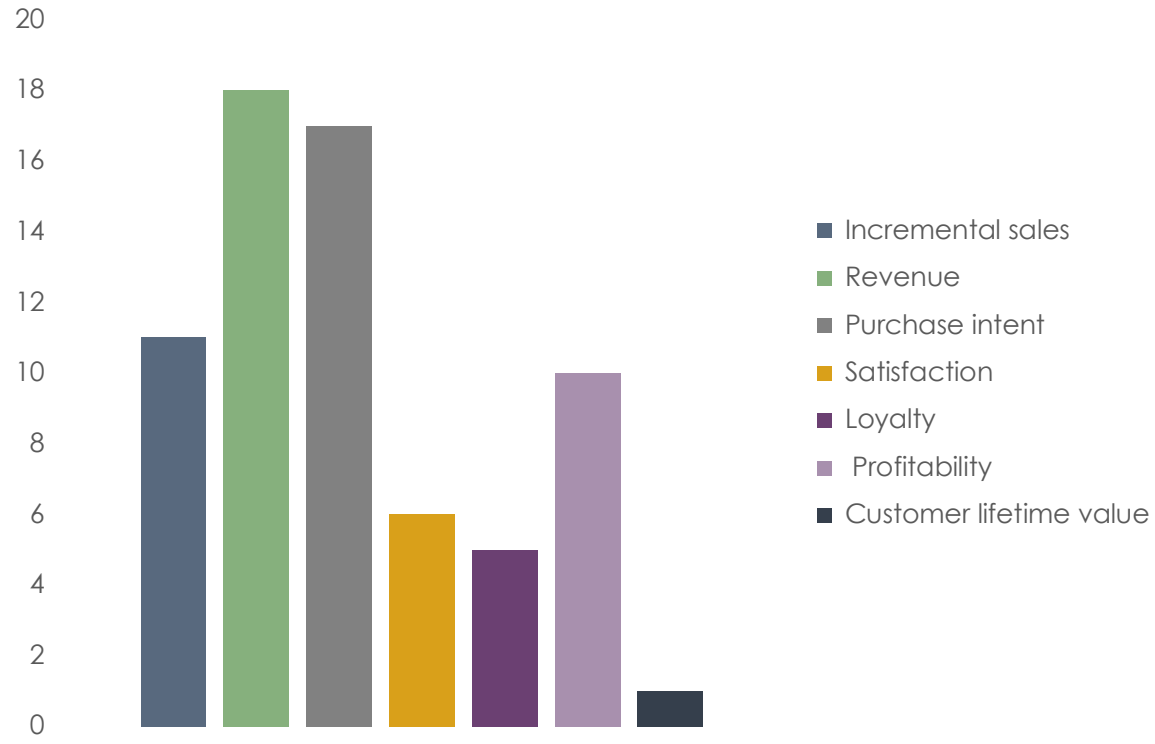


Upselling Analysis

Upselling is the least studied sales mechanism in the reviewed literature (n=27). Nonetheless, the reviewed literature (see Figure 3 below) have consistently proven that upselling initiatives lead to a direct increase to incremental sales, overall revenue, and purchase intentions (e.g., Ahn et al., 2022; Kim, 2023). Implementing segmented add-on pricing strategies could also improve profitability and loyalty (Aydin and Ziya, 2008; Ma et al., 2020; Yilmaz et al., 2022). Lastly, personalized messaging upselling could also improve customer satisfaction (Remountakis et al., 2023).

The Empirical methods used include regression analysis (25%), structured equation modelling (22%) and field experiments (19%). Overall, the evidence presented is strongest within the travel and ecommerce sectors.

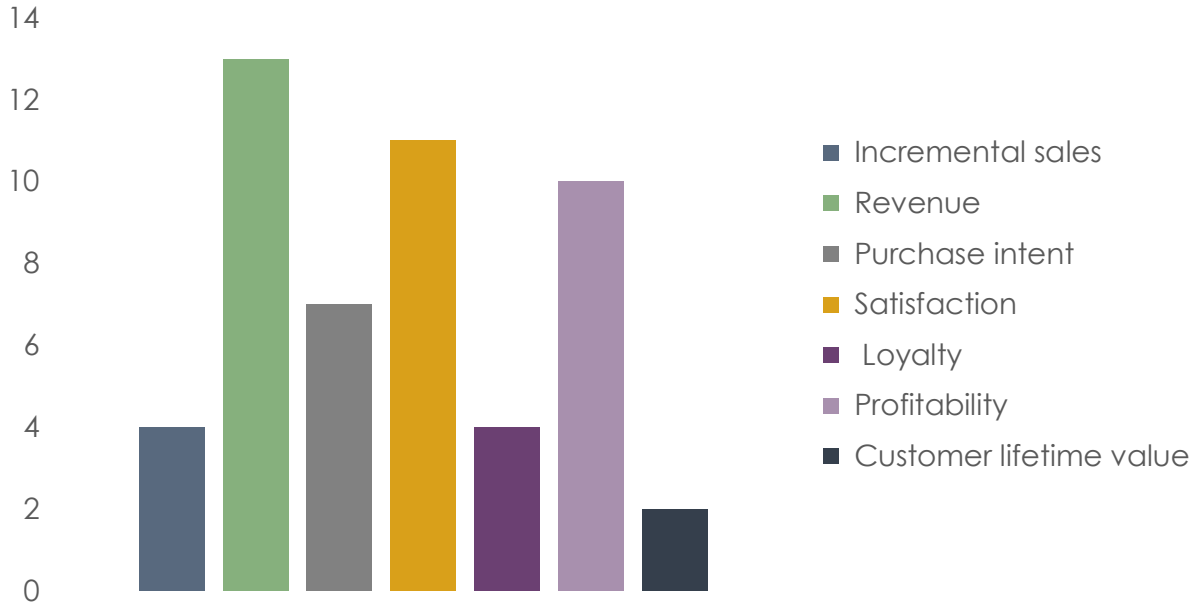
Figure 3: The Impacts of Upselling



Add-on Analysis

Add-on was the second most studied mechanism in the reviewed literature (n= 35). However, articles relevant to the retail context were few. Overall, the literature supports that add-on initiatives led to an increase in revenue, satisfaction, and loyalty (e.g., Dhebar, 2023; Kim et al., 2023; Liu et al., 2020). Add-ons improve customer lifetime value with effective value proposition communication. (Dhebar, 2023). Purchase intent of Add-ons also depends on the retail channel (Leung and Wen, 2020), the customer-retailer relationship (Reinartz et al., 2008), and pricing of the base product (Jang and Chung, 2021). The Empirical methods used in the reviewed literature include regression analysis (34%), surveys and questionnaires (14%), and ANOVA (14%).

Figure 4: The Impacts of Add-ons



Conclusions and Implications

This systematic literature review aims to provide a comprehensive understanding of in-store sales mechanisms by synthesizing empirical findings and identifying gaps in the existing literature. The focus on upselling, cross-selling, add-ons, promotions, and merchandising offers valuable insights for academics and practitioners.

Cross-selling

To foster cross-selling opportunities, the literature suggests several approches. Firrms may utilize promotions such as coupons (Stefan M. et.al., 2018) and Point of Sale strategies to increase offline interfaces between the store and retailer. Other studies suggest that cross-selling can be achieved through enhanced in store visits though offline shopping credits and raising the bar for free shipping on online sales channels (Brockhaus, 2024), printed recommendations at checkout (Hruschka, 2024) or interaction between the delivery person and the end consumer (Urban

and Russell, 2024). Furthermore, providing in-store samplings not only attracts customers to make additional purchases, but also reduces potential costs from returns (Mau et.al., 2018; Yang and Ji, 2022).

Inventory management-wise, when a cross-selling factor exits, having separate inventory and separate orders are shown the most beneficial for retailer's total profit (Lu et. al., 2020). Inventory management-wise, when a cross-selling factor exists, having separate inventories and separate orders is shown to be most beneficial for a retailer's total profit (Lu et al., 2020). To further support these outcomes, effective product placement and assortment mix, guided by generational algorithms such as Intelligent Product Cross-Selling Systems (Wong, 2012) and in-store customer movement data (Tsai and Huang, 2015), can enhance the speed and accuracy of purchase and shelfing decisions (Sah et al., 2019), thereby aligning operational efficiency with strategic cross-selling efforts.

Upselling

The reviewed literature has suggested many practical implications to strategically utilize upselling opportunities.

Upsell messaging could also be tailored based on specific customer behaviours; digital recommender systems could cluster customer segments to then promote upsell messages such as: "Customers like you upgraded to this product; " with this method proven to increase revenues and average order value, which is linked to higher purchase intent with this type of messaging (Behera et al., 2020). ChatGPT has been proven to be a sufficient tool to develop effective messaging that is persuasive (according to influence and emotional principles), and personalized to customer behaviour (Remountakis et al., 2023).

Furthermore, customer data could be used to study customer purchase behaviour to determine the most effective upselling discount

offer to maximize purchase intent and profitability. Aydin and Ziya (2008) discusses that retailers should systematically offer a discount for upsell products whose consumer reservation prices are negatively correlated with those of the primary purchase (i.e., dissimilar upsells, such as premium upgrades), while refraining from discounting intrinsically similar upgrades (i.e. dips and chips). Furthermore, Recency, Frequency, and Monetary value-based targeting, could be utilized to identify high-value customers. High-value customer should then be given personalized messaging and offers to maximize purchase intent; yet the feeling of privacy intrusions should be of concern when implementing this (Ma et al., 2020; Yilmaz et al., 2022).

Add-on

Several relevant insights were presented in the reviewed literature to improve the effectiveness of add-on initiatives.

Kim and Tanford (2023) conclude that the purchase intent of an add-on offer depends greatly on the offer presentation and the nature of the base product; moreover, an unexpected discount is more likely to prompt customers to buy add-ons as this improves their mood on the spot. Customers are more likely to purchase add-ons for hedonic products when presented with a discount, compared to utilitarian products; therefore, it is recommended to enhance the experiential aspects of utilitarian products in their promotion (i.e. imagery and emotions) (Kim and Tanford, 2023).

The purchase intent of an add-on significantly increases as the customer develops loyalty for a retailer or brand; not vice versa. Thus it is more approporiate to use add-on offers towards loyalist, instead of attempting to attract new potential loyalist with add-on offers (Reinartz, 2008). In a competitive market, it is crucial to deploy add-on offers that

are differentiated from competitors as to best improve the perceived value of the add-on thus subsequently, satisfaction and purchase intent (Liu et al., 2020).

When add-ons are sold in the middle of a product lifecycle, it is crucial to provide enticing value proposition communications in relation to the perceived value of the base product (Dhebar, 2023) and the absolute financial value of the base product (Jang and Chung, 2021).

Lastly, the medium of delivery of an add-on offer depends on the product complexity. Complicated add-on products, such as wine pairings, should be sold through mediums with high problem-solving capabilities, such as in-person selling, and websites (to allow for more advanced customer decision making) Whilst, simple add-on products, such as dips to fries, could be sold in mediums without high problem-solving capabilities such as Chatbots or ordering screens (Leung and Wen, 2020).

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Appendix A: Steps of Systematic Literature Review