

Omnichannel Retailing as a Consumer-Based Strategy

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Resumo

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Abstract

Scholars recognize that understanding how customers use multiple channels is essential to develop successful omnichannel strategies. However, the customer experience in this environment remains underdeveloped. Against this background, this essay presents a reflection on the omnichannel retailing literature and the knowledge this body of research has produced about the customer so far. It identifies that a myopic view of the customer experience throughout the customer journey prevails, focusing only on what happens across physical and online stores at prepurchase and purchase stages. This view is disconnected from the complexity of customer journeys encompassing multiple points of contact within and outside the firm control. To overcome these gaps, this essay suggests that a *consumer* perspective is needed, thus departing from the relationship with a single firm to emphasize that consumers interact with multiple actors and touchpoints during the journey. The shift from the customer to the consumer aims to generate insights into omnichannel consumption phenomena that will foster the development of consumer-based organizational strategies. To this end, this essay delineates research paths for the future.

Keywords: Omnichannel retailing; Customer experience; Customer journey; Marketing Strategy.

1. Introduction

A decade ago, Rigby (2011) inaugurated a new research stream in retailing. In the article, the author presents “something so different that it requires a new name” (p. 65) and argues that it – *omnichannel retailing* – would disrupt the industry, guarantee firms’ survival, and revolutionize the *customer experience*. The main assumption is that retailers need to integrate online and offline channels. Since the publication, researchers have been investigating what channel integration means and how to do it properly (Cao & Li, 2018; Mirzabeiki & Saghiri, 2020; Oh et al., 2012; Saghiri et al., 2017). Not surprisingly, a firm perspective prevails over a customer perspective in this literature.

Managers have defined channel integration as the major challenge they need to overcome to move to omnichannel retailing. That means shifting from a “silo” mentality that treats online and offline channels separately to the holistic management of all channels (Piotrowicz & Cuthbertson, 2014). Accordingly, a growing body of literature explores the drivers and barriers to channel integration, including organizational characteristics (Cao & Li, 2018), strategic and operational plans (Picot-Coupey et al., 2016; Ye et al., 2018), and human resources (Song et al., 2020). Given the complexity of these factors, researchers describe omnichannel retailing as an ideal (Cui et al., 2020) and even find that it might be a utopia for some firms (Hajdas et al., 2020). Companies, in general, seem to be in-between two ends of a continuum of integration intensity in which multichannel retailing is one extreme and omnichannel retailing is the other (e.g., Emrich et al., 2015; J. Zhang et al., 2010). They operate multiple and interconnected channels; yet they are not fully, smoothly integrated (Thaichon et al., 2020; Verhoef et al., 2015). In addition to channel integration issues, researchers have focused on conceptually developing omnichannel retailing (e.g., Verhoef et al., 2015), overcoming data challenges (e.g., Cui et al., 2020; Mirzabeiki & Saghiri, 2020), and measuring firm performance (e.g., Danaher et al., 2020; Fisher et al., 2019).

Meanwhile, the customer experience in this evolving environment received less attention, even though it plays a fundamental role in value exchange in retailing (Grewal et al., 2009). One reason for this might be that literature has treated superior customer experience as an automatic outcome of omnichannel strategies (Rigby, 2011; Verhoef et al., 2015) – if retailers integrate functions across channels, then they will deliver superior customer

experience. This approach is often incompatible with the position encouraged by Palmatier et al. (2020) that a marketing channel strategy should start with understanding how people buy.

Customer-focused papers are gaining more projection in omnichannel literature since the second half of the 2010s. A turning point seems to be the publication of Lemon and Verhoef's (2016) article in which the authors summarize the extant findings in marketing literature and call researchers to advance knowledge on the complex purchase journeys encompassing multiple channels. Recent studies explore, for instance, behaviors and characteristics of omnichannel customer segments (e.g., Herhausen et al., 2019; Valentini et al., 2020) and specific combinations of channels, known as webrooming and showrooming (e.g., Fernández et al., 2018).

Despite the growing interest in the omnichannel customer journey, a narrow perspective still prevails, with studies focusing on customer experience with a focal retailer and its physical store and website channels (e.g., Flavián et al., 2020; Gao, Fan, et al., 2021; Swoboda & Winters, 2021). In reality, journeys are much more complex than that. They can encompass multiple retailer-owned and external touchpoints (Lemon & Verhoef, 2016) and pass through multiple shopper states (e.g., search, purchase, use, share, evaluate; L. Lee et al., 2018). Thus, prioritizing the knowledge about how customers experience omnichannel retailing could provide more valuable insights to guide channel integration strategies.

What do we know about the customer in omnichannel retailing? What do we need to know to frame a more realistic customer journey and then provide more valuable insights for strategy development? Our aim with this essay is to reflect on these questions. To do that, we present an overview of how the customer side has been addressed in omnichannel retailing literature, identify gaps in the extant research, and discuss paths to fulfill these gaps. In line with discussions about the role of theoretical essays in business research (Barros, 2011; Bertero, 2011; Meneghetti, 2011a, 2011b), we present here why we believe it is time for omnichannel retailing research to embrace not only a *customer*, but a *consumer* approach in order to move the field forward. This approach involves better understanding the context in which omnichannel customer journeys occur and then generating consumer insights. Developing consumer-based strategies based on these insights is among the top research priorities of the marketing field (Hamilton, 2016; MSI, 2021).

This essay is organized as follows. Section 2 shows the path to omnichannel in retailing literature and the themes investigated so far. Section 3 reviews what this literature has produced about the customer and identifies the main research gaps. Section 4 discusses a shift in perspective, from customers to consumers, and its implications in the substantive, conceptual and methodological domains. Section 5 offers three research paths to develop omnichannel retailing as a consumer-based strategy. Section 6 presents the concluding remarks.

2. Multichannel Retailing Evolution: The Path to Omnichannel

A traditional view of multiple channels is transaction-focused, defining a channel as a way of selling and delivering merchandise and services to customers (Levy et al., 2013). Reflecting this perspective, Beck and Rygl (2015) define multichannel retailing as “the set of activities involved in selling merchandise or services through more than one channel or all widespread channels, whereby the customer cannot trigger channel interaction and/or the retailer does not control channel integration” (p. 174). Multichannel retailing means that channels are independent entities: whereas the retailer offers more than one channel option to purchase, these channels coexist independently (Mosquera et al., 2017).

Omnichannel retailing is “the set of activities involved in selling merchandise or services through all widespread channels, whereby the customer can trigger full channel interaction and/or the retailer controls full channel integration” (Beck & Rygl, 2015, p. 175). Omnichannel means that consumers can choose whatever channel they prefer at any moment.

Because retailers fully integrate channels, perceived interaction is with the brand, not the specific channel (Piotrowicz & Cuthbertson, 2014).

In omnichannel retailing, functional differences become less clear. Hence, the view of a channel as a way of completing a transaction and *also* a medium to interact with customers (Neslin et al., 2006) gain prominence. In the introduction to the *Journal of Retailing* special issue dedicated to omnichannel, Verhoef et al. (2015) recognize that consumers switch across channels and devices not only to purchase but to gather information on products and services as well. They call researchers to broaden the scope of channels to include customer touchpoints such as traditional mass advertising channels, social media, and even consumer-to-consumer communications.

Touchpoints can be internal or external, which means that firms have different levels of control over what happens at these points and how the organization is presented (Barann et al., 2020; Lemon & Verhoef, 2016). On one hand, the retailer has high control over internal touchpoints such as the physical store and the website; on the other hand, the retailer has low control over external touchpoints such as payment platforms and customer forums. It is important to acknowledge that the internal-external separation is not categorical, but a continuum in which firms can have varying degrees of control over partner-owned touchpoints. In this vein, Cui et al. (2020) offer a comprehensive definition of omnichannel marketing as “the synergistic management of all customer touchpoints and channels both internal and external to the firm to ensure that the customer experience across channels as well as firm-side marketing activity, including marketing-mix and marketing communication (owned, paid, and earned), is optimized for both firms and their customers” (p. 104).

As literature advanced conceptualization, research interest moved to channel integration topics (Mirzabeiki & Saghiri, 2020). The literature shows that enhanced firm performance is a key benefit from adopting multichannel and omnichannel retailing strategies. For instance, adding new channels to the scope of traditional ones can be profitable as synergies outweigh cannibalization (Avery et al., 2012; Pauwels & Neslin, 2015). Moreover, integrating channels functions such as promotion, price, and assortment impacts sales growth (Cao & Li, 2015) and cost efficiency (Tagashira & Minami, 2019). There is also evidence that both online and offline sales benefit from a reduction in delivery times (Fisher et al., 2019), as well as multimedia advertising (Danaher et al., 2020).

In addition, the literature explores barriers to achieve omnichannel retailing, shedding light on the challenges that emerge since the early stages of channel integration (Cao & Li, 2018). For instance, Picot-Coupey et al. (2016) identify strategy-related and development-related challenges faced by an e-tailer in its transformative process to become an omnichannel retailer, including organizational challenges such as changing culture and making teams collaborate. Ye et al. (2018) investigate how business silos are related to several barriers to the omnichannel transformation. Focusing on human resources, Song et al. (2020) examine the role of human capital (i.e., skills, attitudes, interpersonal relationships) in the success of the supply chain integration. Hajdas et al. (2020) go beyond internal barriers and show that external factors such as the market and legal environment play an important role in firms’ potential to implement omnichannel retailing, to the extent that this strategy would be a utopia in some industries.

Even when the retailer successfully integrates its channels, obstacles often remain because some touchpoints with the customer (e.g., payment, delivery) are managed by multiple partners. Mirzabeiki and Saghiri (2020) recognize that automated data capturing and sharing significantly improves the operations between retailers and partners. In the same line, Cui et al. (2020) identify several challenges in access and integration of data from external touchpoints and suggest shared models based on artificial intelligence to overcome the lack of centralization.

What this body of literature makes clear is there is no “one size fits all” when it comes to integration. The omnichannel transformation poses several challenges to retailers, requires significant resources, and depends on factors sometimes outside the retailer’s control. Thus, finding the optimal level of channel integration remains an important issue (Thaichon et al., 2020). As we discuss in the following sections, the answer to this issue demands a better understanding of the customer perspective.

3. A Myopic View of the Customer in Omnichannel Retailing

Omnichannel retailing objectives are twofold: (1) providing a seamless customer experience across touchpoints and (2) optimizing firm performance over channels (Verhoef et al., 2015). In this literature, firm-focused papers mainly address topics related to channel management such as integration, fulfillment, pricing, and marketing communications, as well as performance outcomes (Gerea et al., 2021; Mishra et al., 2021; J. Wang et al., 2020). The customer experience, however, did not receive the same level of attention. As we examine in this section, a myopic view prevails even in customer-focused papers. Before addressing this problem, however, it is worth defining key concepts.

3.1 Defining Key Customer Concepts

Customer experiences are customers’ responses to a firm along with the prepurchase, purchase, and postpurchase situations (Homburg et al., 2017). These responses are internal and subjective (Meyer & Schwager, 2007), and have cognitive, emotional, behavioral, sensorial, and social components (Lemon & Verhoef, 2016). Customer experience is the primary result of direct and indirect interactions with market actors, thus “constituting the ‘raw’ data underlying and driving the specific processes that shape consumer behavior” (De Keyser et al., 2015, p. 14). Becker and Jaakkola (2020) argue that the construct comprises “customers’ non-deliberate, spontaneous responses and reactions” (p. 9), which differentiates experiences from traditional evaluative concepts such as satisfaction and service quality. De Keyser et al. (2020) add granularity to the definition by exploring three building blocks of customer experience. Customer experience is formed through touchpoints (i.e., individual contacts between a brand or firm and customers) embedded in a broader context (i.e., a certain time and/or place) and marked by a set of qualities (i.e., attributes of customer responses and reactions). Taken together, these three building blocks result in a value judgment by customers.

Finally, the customer journey is a process encompassing multiple touchpoints over time, some of them external to the firm such as partner-owned and customer-owned touchpoints (Lemon & Verhoef, 2016). One important theme within this literature is the range of channels mediating interactions between firms and customers, which is growing with omnichannel retailing development (Tueanrat et al., 2021).

3.2 Reviewing Omnichannel Customer-Focused Papers

Table 1 provides an overview of omnichannel customer-focused empirical papers published in high-impact journals. Overall, research themes explore (1) how customers respond to omnichannel stimuli, (2) how customer decision-making develops in this environment, (3) what are the new customer behaviors, and (4) which are the omnichannel customer segments. Next, we detail each group.

First, a growing body of research examines customer response to omnichannel retailing stimuli offered by a focal retailer, such as uniformizing the retail mix across channels (e.g., Goraya et al., 2020; Huré et al., 2017), integrating information access across online and offline stores (e.g., Herhausen et al., 2015), and promoting consistency and transparency of services (e.g., M. Gao & Huang, 2021; Quach et al., 2020). Taken together, these studies provide insights into how omnichannel retailing strategies positively influence shopping value

perceptions (Huré et al., 2017), purchase intention (Herhausen et al., 2015), and customer loyalty (Gao & Huang, 2021; Quach et al., 2020; Swoboda & Winters, 2021).

Second, several papers investigate customer decision-making in omnichannel environments. For instance, Hu and Tracogna (2020) focus on the determinants of different customer journeys, including factors such as the need for information, shopping innovation, and convenience. On a more abstract level, Harris et al. (2018) explore the customer motivations to configure their omnichannel journeys. Results shed light on the higher-order goals that customers pursue (e.g., be a good citizen). Other papers examine how customers choose channels for interacting with firms (Barwitz & Maas, 2018; Miquel-Romero et al., 2020; Pozza, 2014). Overall, these papers demonstrate the antecedents of omnichannel customer variables in terms of psychographic and situational factors.

Third, because omnichannel retailing strategies provide customers with more opportunities to communicate and purchase, researchers and practitioners are interested in new behaviors that emerge when customers combine channels. Two of the most known omnichannel behaviors are webrooming (i.e., research online, purchase offline) and showrooming (i.e., research offline, purchase online) (Verhoef et al., 2015). Studies show that webroomers seek in-depth online information, go to the physical store with a firm idea, and are not easily influenced by sellers (Fernández et al., 2018), which impacts perceptions and feelings of shopping in a smart way (Flavián et al., 2020). In the luxury consumption context, webroomers value the usefulness of online channels to gather information but choose the physical store to purchase because they want to touch and feel high-end products and also fulfill socialization needs (Shankar & Jain, 2021). Showroomers seek the best price at a certain quality level and are more easily influenced (Fernández et al., 2018), but do not necessarily feel they save more money than webroomers (Flavián et al., 2020). In sum, these studies reveal the complexity of search and purchase stages of omnichannel customer journeys.

Fourth, segmentation studies examine patterns of touchpoints usage. Herhausen et al. (2019) identify antecedents of loyalty in different customer segments and show that journey satisfaction is more relevant than product satisfaction for shoppers who use multiple touchpoints to search and purchase. Valentini et al. (2020) find that customers who use both online and offline touchpoints to procure and use promotions respond more strongly in consumption than customers who are online or offline-focused. Frasquet et al. (2019) show that mobile usage for information search and purchase is positively related to the segment of customers who complain through multiple channels. These papers provide valuable insights into the complex behaviors and characteristics of omnichannel customer segments.

Even though research interest in omnichannel customers is growing each year, Table 1 reveals that a myopic view of the customer experience throughout the journey prevails. This myopic view seems to be a consequence of three factors: (1) customer response to omnichannel stimuli has been treated superficially; (2) the scope of touchpoints under consideration has been narrow; (3) the stages of the customer journey has not been fully addressed. Of course, some papers are exceptions to at least one of these three factors. However, there is room for substantial progress in this literature.

The majority of papers from Table 1 focus on the customer response to omnichannel retailing, which is fundamentally the definition of customer experience (Homburg et al., 2017). However, they often do not deepen *how* customers react to omnichannel stimuli. Herhausen et al. (2015), Herhausen et al. (2019), and Blom et al. (2021) are examples of this somewhat superficial approach as they investigate evaluative concepts – perceived service quality, perceived service excellence, and satisfaction – as customer outcomes that lead to purchase intention and loyalty. That is, they do not explore which internal processes drive these evaluations and what is the role of different experience dimensions (e.g., cognitive, emotional, social) in shaping the response.

Table 1*Customer-Focused Empirical Papers*

Reference	Theme	Scope of touchpoints		Stages of the customer journey	Customer outcomes	Methods	Theoretical background
		Int.	Ext.				
Li and Kannan (2014)	Customers' touches through multiple online channels before conversion	✓	✓	P1; P2	NA	Secondary data	Attribution models
Pozza (2014)	Customer choice of social and traditional channels to communicate with firms	✓		P1; P2; P3	NA	Interview	Goal theory
Herhausen et al. (2015)	Customer outcomes of online-offline channel integration	✓		P2	Perceived service quality; Perceived risk; Purchase intention	Experiment	Technology adoption models; Diffusion theory
Huré et al. (2017)	Omnichannel shopping value	✓		P1; P2; P3	Shopping value	Interview; Survey	Shopping value
Barwitz and Maas (2018)	Customer's choice of channels to interact with a service provider	✓	✓	P1; P2; P3	NA	Focus group; Interview	Means-end theory
Fernández et al. (2018)	Showrooming and webrooming behaviors	✓	✓	P1; P2	NA	Survey	Elaboration Likelihood Model
Harris et al. (2018)	Shopping motivation in omnichannel retailing	✓		P1; P2	NA	Interview	Goal theory
Frasquet et al. (2019)	Customer segmentation by patterns of channel usage to voice complaints	✓		P3	NA	Survey	Customer complaint behavior
Herhausen et al. (2019)	Customer segmentation by touchpoints usage	✓	✓	P1; P2	Satisfaction; Loyalty	Survey	Anticipated utility theory
Flavián et al. (2020)	Showrooming and webrooming behaviors	✓		P1; P2	Smart shopping perceptions and feelings	Experiment	Customer experience
Goraya et al. (2020)	Customer response to channel integration	✓		P1; P2	Empowerment; Patronage intention	Survey	Self-determination theory
Hu and Tracogna (2020)	Determinants of customer journeys in omnichannel retailing	✓	✓	P1; P2	NA	Survey	Customer journey

Reference	Theme	Scope of touchpoints		Stages of the customer journey	Customer outcomes	Methods	Theoretical background
		Int.	Ext.				
Miquel-Romero et al. (2020)	Customer choice of channels to voice postpurchase complaints	✓		P3	NA	Survey; Experiment	Customer complaint behavior; Stimulus-organism-response model
Quach et al. (2020)	Customer response to omnichannel service integration	✓		NS	Flow; Perceived privacy risk; Loyalty	Survey	Flow theory; Hyperbolic discounting theory
Valentini et al. (2020)	Customer segmentation by channels used to procure and use promotions	✓	✓	P1; P2	NA	Survey	Motivation-Opportunity-Ability framework
Blom et al. (2021)	Customer response to omnichannel promotions	✓		P1; P2	Satisfaction; Perceived service excellence	Experiment	Congruity theory
Gao and Huang (2021)	Customer response to omnichannel integration quality	✓		NS	Engagement; Loyalty	Survey	Customer engagement
Gao, Fan, et al. (2021)	Customer experience in integrated channels	✓		NS	Cognitive and affective experience; Usage intention	Survey	Stimulus-organism-response model
Gao, Li, et al. (2021)	Congruence between online and offline customer experience	✓		NS	Retention	Survey	Goal theory
Shankar and Jain (2021)	Webrooming behavior	✓		NS	Hedonic and utilitarian value; Online risk perceptions	Survey	Technology acceptance model
Swoboda and Winters (2021)	Customers' perceptions and attitudes towards online and offline channels	✓		NS	Loyalty	Survey	Categorization theory

Note. NS = Not Specified; NA = Not Applicable; P1 = Prepurchase; P2 = Purchase; P3 = Postpurchase.

Nonetheless, there are exceptions. Gao, Fan, et al. (2021) analyze how the integration of online and physical stores affects the cognitive and emotional dimensions of customer experience. They show that integrating functions across channels (e.g., promotion, price, information) positively influences customer reactions related to efficiency and entertainment in the shopping process, leading to an increase in the intention to use the retailer services in the future. Moreover, Flavián et al. (2020) find that webrooming and showrooming activities impact customers' perceptions of saving time/effort and making the right purchase (i.e., cognitive experiences) and also their feelings of smart shopping (i.e., affective experiences).

Table 1 also shows that the scope of touchpoints investigated in these papers is surprisingly narrow considering the complexity of customer journeys in omnichannel environments. The majority of the papers focus only on internal touchpoints such as physical stores and online stores (e.g., Blom et al., 2021; Goraya et al., 2020; Huré et al., 2017; Swoboda & Winters, 2021). Others add the firm's official profiles on social media to the scope of internal touchpoints (e.g., Frassetto et al., 2019; Miquel-Romero et al., 2020; Pozza, 2014). Few papers address external touchpoints. Exceptions address search engines (e.g., Herhausen et al., 2019; Li & Kannan, 2014), comparison and review websites (e.g., Barwitz & Maas, 2018; Hu & Tracogna, 2020), earned media (e.g., Fernández et al., 2018; Valentini et al., 2020), and word-of-mouth from friends and family (e.g., Herhausen et al., 2019; Hu & Tracogna, 2020). Only Herhausen et al. (2019) include competitors' touchpoints to the scope of touchpoints under consideration.

Customer literature in omnichannel retailing has been exploring mainly the prepurchase and purchase stages of the journey, thus focusing on customer activities that happen in more firm-controlled touchpoints, such as search, choice, order, and payment. Few papers explore activities in the postpurchase phase when more customer-controlled touchpoints became relevant for activities such as consumption and engagement (Lemon & Verhoef, 2016). Nonetheless, papers from Table 1 that address postpurchase complaints (e.g., Frassetto et al., 2019; Miquel-Romero et al., 2020) still only focus on internal touchpoints. These observations are in line with results from a systematic review on the customer journey showing a gap of studies covering the postpurchase stage, notably in the sub-themes of customer channel behavior and channel management (Tueanrat et al., 2021).

In sum, customer-focused omnichannel literature so far provides valuable insights. However, a closer look at this body of research reveals several gaps that need to be addressed. Little is known about how different dimensions of customer experience shape customer response – this is especially true for the social dimension. In addition, the role of external touchpoints in the customer journey remains largely unexplored, particularly in the postpurchase stage. Future research that fills these gaps is imperative for overcoming a myopic view and advancing the field. In the following sections, we discuss how a shift in perspective might be a way to address that.

4. The Need for a Consumer Perspective to Omnichannel Retailing

The customer experience throughout the customer journey is a subjective and context-specific process (Becker & Jaakkola, 2020). Thus, the study of the customer in omnichannel retailing requires a customer-centric perspective. However, this perspective has not been enough to address the aforementioned research gaps. For this reason, we argue that adopting a *consumer* perspective is a way to deepen the understanding of customer journeys in omnichannel retailing and provide more valuable directions for retailers.

Here it is worth differentiating two concepts often used interchangeably. Hamilton and Price (2019) acknowledge that *customers* have relationships with a specific organization, whereas *consumers* are involved with multiple actors (e.g., service providers, objects, other consumers).

Hamilton (2016) argues that specialization within the field of marketing can be defined by the unit of analysis. Thus, insights about consumers nurture the development of consumer-based organizational strategy. The difference between consumer research and consumer-based strategy is that the former generates insights into consumption phenomena (Deighton, 2007); the latter uses these insights to develop strategies. As consumer insights are not specific to a firm, a consumer perspective to omnichannel retailing could help researchers to better explore how consumers react to a variety of stimuli in their journeys, including reactions that happen in touchpoints outside firms' control.

Essential for a consumer perspective is the understanding that customer journeys as typically depicted in the literature are only a part of the story. Customer journeys focused on the purchase of specific products or services are embedded into a broader service system encompassing different actors and activities, in which consumers are focused on achieving higher-order goals such as having a healthy lifestyle (Becker et al., 2020). In other words, customer journeys are motivated by more concrete goals, such as getting medications; consumer journeys are motivated by more abstract goals, such as feeling good (Hamilton & Price, 2019). Researchers call for a more consumer-centric view of journeys to shed light on the different roles that individuals have (e.g., patients, consumers, producers), their multiple interactions with other consumers, firms, and objects over time, and the socio-cultural context of value creation (Hamilton & Price, 2019; Schau & Akaka, 2021).

How this perspective could help to advance omnichannel retailing research? To answer this question, it is important to reflect on how knowledge expands in a discipline. A well-known framework that suits this purpose was proposed by Brinberg and McGrath (1985) for the analysis of research processes (Figure 1). The research process is defined as the identification, selection, combination, and use of elements and relations from three interrelated domains: the substantive domain (i.e., the content), the conceptual domain (i.e., the ideas that give meaning to content), and the methodological domain (i.e., the procedures to study content and ideas). A combination of two domains results in alternative paths that researchers follow in a given project. Taken together, the domains and paths provide a unique perspective and advance a discipline over time (Grewal et al., 2016; Yadav, 2010).

Brinberg and McGrath (1985) explain that the research process begins with the evaluation of elements and relations within each domain. Then, it moves to the combination and use of elements and relations from the domains on a chosen research path. In this essay, it is useful to discuss in detail what is needed for a collective research process that develops omnichannel consumer-based strategies. We start by presenting considerations in each domain.

4.1. Substantive Considerations

The substantive domain refers to real-world phenomena, the states and actions of entities (e.g., individuals, organizations), "what is 'there' prior to and independent of the intellectual enterprise we call research" (Brinberg & McGrath, 1985, p. 33). It comprises practical issues that need to be explored (Grewal et al., 2016).

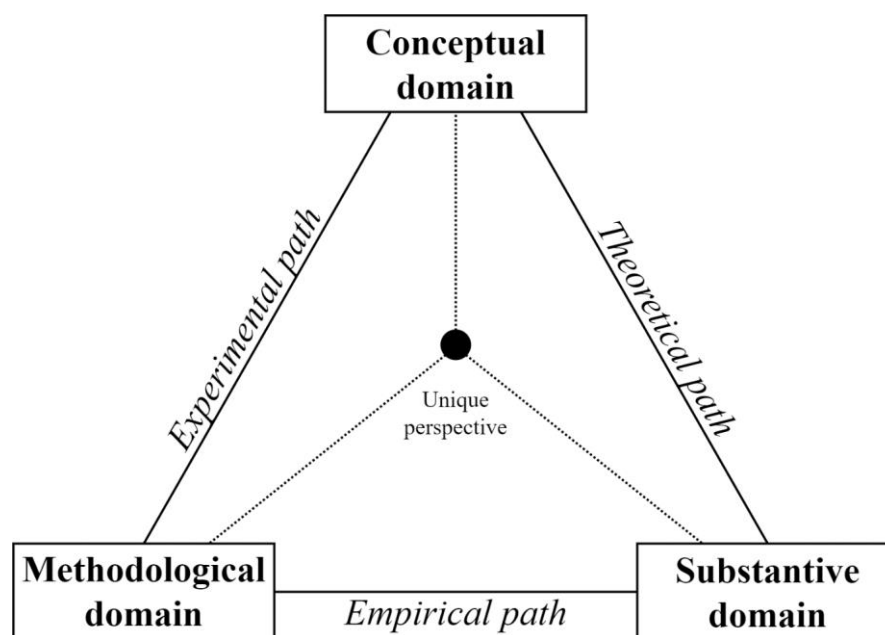
For a consumer-based omnichannel strategy, the substantive elements would be actors behaving in some context (i.e., phenomena); for instance, consumers purchasing an apparel product from an omnichannel retailer. The substantive relations would be patterns of events such as consumers checking the retailer app for better prices while in the physical store. These elements and relations would be embedded in a higher substantive system (i.e., context) that influences the consumer journey, such as the fashion industry.

To overcome a myopic view and advance knowledge in the substantive domain, it is important to identify the variety of behaviors associated with omnichannel environments. The literature so far has concentrated on exploring the research shopping phenomenon, which is the propensity of researching in one channel and then purchasing through another channel

(Verhoef et al., 2007). This is the case of webrooming and showrooming behaviors (e.g., Fernández et al., 2018; Flavián et al., 2020; Shankar & Jain, 2021). Less is known about consumers picking-up products bought online at a physical location (e.g., store, warehouse), such as Buy Online, Pickup In-Store (Kim et al., 2017; Ortlinghaus & Zielke, 2019), or returning online purchases to the physical store (Robertson et al., 2020). It is also worth analyzing the actors that influence the consumer experience beyond firms, brands, and sellers. Consumers rely on a much larger set of external actors, from other consumers to artificial intelligence. Social influence is so pervasive that ideas such as “traveling companions” (Hamilton et al., 2021) and collective journeys (Thomas et al., 2020) should be integrated into the decision-making process in omnichannel retailing.

Figure 1

Research Domains and Paths



Note. Adapted from Grewal et al. (2016).

4.2. Conceptual Considerations

The conceptual domain is the abstract representation of substantive phenomena (Brinberg & McGrath, 1985). It encompasses theoretical frameworks that connect various concepts underlying a particular phenomenon (Grewal et al., 2016). “Conceptual thinking is at the heart of the scientific enterprise; it is critical to the development of both an individual scientist and the field of endeavor” (MacInnis, 2011, p. 141).

For a consumer-based omnichannel strategy, the conceptual elements would be attributes or properties of phenomena; for instance, the beliefs and attitudes of consumers who purchase from omnichannel retailers. These properties are guided by theories of interest (e.g., technology adoption models). The conceptual relations would be relations between two or more properties and the embedding system would be a set of paradigmatic assumptions that specify these properties.

The retailing field has advanced the conceptualization of omnichannel by differentiating this strategy from multichannel retailing and cross-channel retailing (e.g., Beck & Rygl, 2015; Verhoef et al., 2015). The prevailing view is that omnichannel is the next, ultimate level of a process of channel integration (Hajdas et al., 2020). Researchers are starting

to explore other adjacent concepts that are essential for a consumer perspective, such as omnichannel customer touchpoints (Barann et al., 2020) and omnichannel customer experience (Shi et al., 2020).

In addition, the conceptual domain of omnichannel retailing would benefit if the marketing field develops its own models and theories to explain and predict consumer omnichannel attitudes and behaviors. Table 1 shows that papers published so far employed a variety of theoretical backgrounds borrowed from other disciplines (e.g., psychology, sociology), such as technology acceptance theories (Davis, 1989; Venkatesh et al., 2003) and the stimulus-organism-response framework (Mehrabian & Russell, 1974; Vieira, 2013). New developments of concepts such as the customer experience (e.g., Becker & Jaakkola, 2020; De Keyser et al., 2020) and consumer journey (Hamilton & Price, 2019; Hamilton et al., 2021; Schau & Akaka, 2021) or alternative models of the shopping process (e.g., shopper journey archetypes; L. Lee et al., 2018) may help scholars to overcome theoretical gaps and develop organic marketing theories, as emphasized by Hunt (2020) and Zeithaml et al. (2020).

4.3. Methodological Considerations

The methodological domain refers to methods to interpret information about phenomena (Brinberg & McGrath, 1985). It comprises the techniques and data used to assess the situation (Grewal et al., 2016).

Methodological elements are modes of treatment of variables, such as scales and inventories. Methodological relations are the procedures that enable researchers to examine the relations among variables (e.g., factorial analysis, regression analysis) and the embedding system is the research strategies (e.g., lab experiment, field experiment, survey).

For a consumer-based omnichannel strategy, it is imperative to diversify the methodological approaches to capture consumers' attitudes and behaviors. As Table 1 shows, the majority of studies so far employed surveys, which can be very limiting to address new phenomena. Hence, the field would benefit from more exploratory research designs that allow free expression and better cover processes unfolding over time, which is the case of consumer journeys. Additionally, it is somewhat surprising that only one study analyzed secondary data (Li & Kannan, 2014), which means that there is room to explore information captured from multiple touchpoints across the journey.

Following the considerations about the three domains, we present next three research paths to develop omnichannel retailing as a consumer-based strategy.

5. Research Paths for Developing Omnichannel Strategies

Brinberg and McGrath (1985) state that the research path is a combination of the three domains (i.e., substantive, conceptual, and methodological). More specifically, each path for the research process is a combination of two domains with an application in the third domain.

For each path, we identify research questions (Table 2) to advance general consumer knowledge in omnichannel literature. This approach is in line with frameworks such as the Theory, Methodology, Context (TMC) (e.g., Kumar et al., 2020).

5.1. Theoretical Path

In the theoretical path, researchers combine elements and relations from the conceptual and substantive domains to form a set of hypotheses. Then, they test the hypotheses applying measures and techniques from the methodological domain (Brinberg & McGrath, 1985). In other words, this path involves associating theories and constructs to phenomena issues, and developing and testing predictions (Grewal et al., 2016).

Future research should connect the conceptual domains of customer journeys and customer experience (e.g., Becker & Jaakkola, 2020; De Keyser et al., 2020; Lemon &

Verhoef, 2016) to the study of customers interaction with omnichannel retailers. There is room to improve the conceptualization of omnichannel experience and omnichannel journeys. For instance, researchers could explore a more nuanced view of the stages of an omnichannel customer journey and their relationship with consumer journeys motivated by higher-order goals. Future studies could identify how different dimensions of customer experience manifest in omnichannel settings, as well as what constitutes extraordinary and ordinary experiences in omnichannel retailing. It is also worth exploring the conceptual relationship between customer experience and evaluative concepts such as channel integration quality (Gao & Huang, 2021; Shen et al., 2018), as well as examine how customers perceive their movement across touchpoints (Huré et al., 2017; Siebert et al., 2020).

In addition, the theoretical path involves exploring what is new to consumer behavior as a result of major shifts in the retailing landscape, such as the ability to communicate and shop across multiple online and offline channels at any time (Kahn et al., 2018). Thus, researchers could draw from different disciplines to develop theoretical models aiming to explain omnichannel consumer phenomena (e.g., purchasing online but picking up offline, choosing channels to postpurchase activities).

Findings of the theoretical path should help retailers to map ways to reach customers across multiple media and channels at different stages of the customer and consumer journeys. Hence, they can better identify at which stage the customer is when he or she connects with certain touchpoints, so they can manage or monitor these points to meet consumer needs. Managers will also benefit from a more granular view of customer experiences across online and offline touchpoints, so they can focus on promoting particular experiences when making strategic decisions.

5.2. Experimental Path

In the experimental path, researchers combine elements and relations from the conceptual and methodological domains to design a study and, then, implement the design by selecting phenomena from the substantive domain (Brinberg & McGrath, 1985). In other words, this path involves associating theories and constructs to methods to test theory in a given context (Grewal et al., 2016).

Future research should expand the development of measures of customer constructs used in omnichannel retailing. For instance, the extant literature exploring the customer perception of channel integration issues is conceptually fragmented into perceived channel integration (M. Zhang et al., 2018), service integration (Quach et al., 2020), channel integration quality (Gao & Huang, 2021; Z. W. Y. Lee et al., 2019; Shen et al., 2018), and effective customer journey design (Kuehn et al., 2019). Future studies would benefit from a more unified view on the measurement of integration.

Moreover, the touchpoint concept should be explored beyond an extension of retail channels (e.g., Herhausen et al., 2019) so the role of external touchpoints in the omnichannel customer journey could be clarified. For instance, consumer feedback platforms can facilitate consumer empowerment (Kozinets et al., 2021), and third-party touchpoints can make consumers disassociate the focal firm from dissatisfying points in the journey (Kranzbühler et al., 2019). This way researchers could better understand the interplay between touchpoints within and outside the firm's control. In addition, an in-depth investigation of customer journeys in omnichannel retailing should analyze the roles that consumers assume (e.g., activists, citizens, shoppers) in different touchpoints and how these roles can be encouraged or discouraged.

Findings of the experimental path are relevant to developing more effective omnichannel strategies because they are likely to shed light on often-ignored parts of customer journeys, such as interactions with external touchpoints, and also reveal the consumer view on

channel integration. Understanding the interplay between these two aspects seems imperative to answer how retailers remove barriers across channels.

5.3. Empirical Path

In the empirical path, researchers combine elements and relations from the methodological and substantive domains to form a set of observations and, then, interpret these observations by selecting concepts from the conceptual domain (Brinberg & McGrath, 1985). This path involves associating phenomena to methods to make empirical observations and develop concepts (Grewal et al., 2016).

Future research should track real-time omnichannel journeys to determine how the customer experience evolves. To do this, methods such as interviews and diaries are recommended (Becker, 2018). Other designs rely on mobile technologies to capture every encounter a consumer has with a brand in a given period (e.g., Baxendale et al., 2015).

An extended approach to customer journeys could also provide insights into underdeveloped themes such as service failures and recovery across channels. Van Vaerenbergh et al. (2019) argue that service recovery is a separate journey and call for more research on how customers navigate across these specific touchpoints. Moreover, observations of the customer may unveil the “dark side” effects of omnichannel retailing. For instance, there is evidence that privacy concerns are associated with the perceived risk of omnichannel shopping (Chatterjee et al., 2021; Kazancoglu & Aydin, 2018). More research is needed to understand how omnichannel consumers deal with privacy and intrusiveness issues, particularly over online touchpoints (Cui et al., 2020).

In addition, there are opportunities for future research by expanding the use of secondary data from several touchpoints. Data-driven understanding of the customer is one important pillar of omnichannel strategies (Palmatier et al., 2020). However, integrating data from different sources, especially from external touchpoints is still a challenge. This is a problem that machine learning development in retailing is likely to resolve (X. Wang et al., 2020). For instance, algorithms could analyze data available from multiple sources, including unstructured data (e.g., text, images, video; Liu et al., 2016), to predict outcomes of interest, such as conversion rate and sales, or even to identify cues of customer experience dimensions.

The findings of the empirical path will shed light on the dynamics of customer experience (De Keyser et al., 2020) in omnichannel retailing, which can help managers to develop long-term customer relationships. Other important development is likely to be new methods and tools to aid managerial decisions by, for instance, sophisticating attribution modeling (Li & Kannan, 2014; Wang et al., 2020).

Table 2*Research Questions*

Research path	Research Questions
Theoretical Path	How should the stages of an omnichannel customer journey be conceptualized? How the stages of an omnichannel customer journey are related to higher-order consumer journeys? How do the different dimensions of customer experience manifest in omnichannel retail settings? What constitutes extraordinary vs. ordinary customer experiences in omnichannel retailing settings? How do customers perceive their movement across touchpoints throughout the customer journey? Which concepts and theories from other disciplines help to explain omnichannel phenomena? What is the conceptual relationship between channel integration quality and customer experience?
Experimental Path	How to measure touchpoint integration from a consumer perspective? What are the roles of external touchpoints in the omnichannel customer journey? How do consumers contrast internal and external touchpoints? What are the determinants of channel combinations? How do consumers shift between roles (e.g., activists, citizens, shoppers) when they move across touchpoints in omnichannel retailing? How do different levels of integration across touchpoints influence the customer experience?
Empirical Path	How does the customer experience evolve throughout the customer journey? How do customers deal with service failures and recovery across channels and touchpoints? Does using multiple online touchpoints simultaneously influence customer privacy concerns? How to integrate customer data from internal and external touchpoints? How can machine learning algorithms track customer journeys across internal and external touchpoints? How can unstructured data (text, images, video) from multiple touchpoints predict online and offline demand? How can text mining techniques inform about customer experience across digital touchpoints?

6. Conclusion

Omnichannel literature has advanced the conceptualization and differentiation from multichannel, explored drivers and barriers to channel integration, and analyzed its effects on firm performance. More recently, the customer perspective in this evolving environment started to receive more attention. Following this growing interest, this essay described what we know about omnichannel customers. It also identified gaps that need to be addressed to transform this interest into more valuable insights for marketing strategy. In general, a myopic view of the customer experience throughout the journey prevails. Extant research superficially addresses customer response to omnichannel stimuli and focuses on consumer behavior from a focal retailer perspective, thus disconnected from the complex landscape of internal and external touchpoints that surrounds customers.

To overcome these gaps, we argue that researchers should adopt not a *customer* but a *consumer* perspective to omnichannel retailing. A consumer perspective departs from the relationship with a single firm, emphasizing that consumers interact with multiple actors during

the purchase journey. This view not only broadens the scope of touchpoints under consideration; it also places the customer journey at a broader system of journeys in which consumers are focused on achieving higher-order goals.

This essay presented three research paths (i.e., theoretical, experimental, empirical) for the future. They represent a collective effort to move the field forward. Regardless of individual research paths, the focus needs to be on generating novel insights about omnichannel retailing phenomena, and, more importantly, using this knowledge to inform strategic decisions.

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