

Theoretical-empirical article

# Omnichannel as a Consumer-Based Marketing Strategy



Omnichannel como Estratégia de Marketing Baseada no Consumidor

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## ABSTRACT

**Objective:** creating omnichannel strategies requires understanding how customers use multiple channels in their journeys. Yet the customer experience in this environment is under-researched, hindering the development of strategic guidelines and the progress of omnichannel theory. This article offers an overview of the omnichannel literature and reflects on the knowledge produced from the customer's perspective.

**Theoretical approach:** we base our analysis on customer experience and customer journey research. **Method:** using content analysis, we critically review 29 studies on omnichannel customers. **Results:** the focus on the customer experience within one firm's offline and online stores during the prepurchase and purchase stages leads to a limited picture of journeys involving touchpoints within and outside the firm's control. To address this myopia, we call for a consumer perspective that moves away from the relationship with a single firm to emphasize that consumers interact with various actors to achieve not only purchase objectives but also higher-order goals (e.g., well-being). **Conclusions:** through a consumer perspective, we outline research paths for generating consumer insights. The agenda contributes to fostering omnichannel marketing as a consumer-based strategy that is sensitive to contemporary consumer and societal issues.

**Keywords:** omnichannel; customer experience; customer journey; marketing strategy.

## RESUMO

**Objetivo:** estratégias *omnichannel* requerem entender como clientes usam múltiplos canais. Porém, a experiência do cliente nesse ambiente é pouco investigada, dificultando o desenvolvimento de diretrizes estratégicas e o avanço de teoria *omnichannel*. Este artigo oferece um panorama da literatura *omnichannel* e reflete sobre o conhecimento gerado da perspectiva do cliente.

**Marco teórico:** baseamos a análise na pesquisa em experiência do cliente e jornada do cliente. **Método:** usando análise de conteúdo, revisamos criticamente 29 estudos sobre clientes *omnichannel*. **Resultados:** o foco na experiência do cliente em lojas físicas e on-line de uma empresa nos estágios de pré-compra e compra leva a uma noção limitada das jornadas envolvendo contatos dentro e fora do controle da empresa. Para lidar com a miopia, defendemos uma perspectiva do consumidor que se afaste do relacionamento com uma única empresa para enfatizar que consumidores interagem com vários atores para alcançar não apenas objetivos de compra, mas também de ordem superior (e.g., bem-estar). **Conclusões:** por meio da perspectiva do consumidor, delineamos caminhos de pesquisa para gerar insights sobre o consumidor. A agenda contribui para promover o marketing *omnichannel* como uma estratégia baseada no consumidor que seja sensível a questões atuais de consumidores e da sociedade.

**Palavras-chave:** *omnichannel*; experiência do cliente; jornada do cliente; estratégia de marketing.

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## INTRODUCTION

About a decade ago, a *Harvard Business Review* article inaugurated a promising research stream in marketing. Rigby (2011) wrote that digital retailing was evolving to “something so different that it requires a new name” (Rigby, 2011, p. 65). The author argued that it — omnichannel retailing — would disrupt the industry, guarantee firms’ survival, and revolutionize the customer experience in an integrated physical and digital world.

Since then, researchers have investigated channel integration strategies to overcome a ‘silo’ mentality that separates online and offline worlds (Piotrowicz & Cuthbertson, 2014; Verhoef et al., 2015). A growing body of literature explores the drivers and barriers to integration (Cao & Li, 2018; Picot-Coupey et al., 2016). However, mixed findings on the effects of marketing mix alignment across channels suggest that integration still faces significant challenges in omnichannel marketing (see Timoumi et al., 2022, for a review).

In contrast with the initial optimism, researchers often consider omnichannel marketing an ideal (Cui et al., 2020) and even suggest it might be utopic for some firms (Hajdas et al., 2022). An emerging view is that omnichannel marketing is a continuum of channel integration intensity where firms align their objectives (Neslin, 2022), rather than a strategy that always aims for full integration. While work is still in progress to define what omnichannel phenomena are, there are no clear guidelines for implementing omnichannel strategies.

Meanwhile, the customer experience in this evolving environment received less attention, despite its fundamental role in value exchange (Grewal et al., 2009). One reason for this might be that literature has treated superior customer experience as a natural consequence of omnichannel strategies (Rigby, 2011; Verhoef et al., 2015). However, recent studies challenge the assumption that customers want uniformity across channels (Gasparin et al., 2022; Mencarelli et al., 2021), suggesting that understanding customer experience is a crucial step before determining the level of channel integration. As Palmatier et al. (2020) recommend: “the focus of any channel strategy should be to understand how people buy” (Palmatier et al., 2020, p. 319).

An awakening to explore the customer side of omnichannel marketing is underway, with increasing prominence given to customer-focused papers. A turning point was the publication of Lemon and Verhoef’s (2016) article summarizing findings on customer experience and calling researchers to advance knowledge on complex journeys across multiple channels. Yet, a narrow focus persists, as studies focus on the customer’s relationship with

specific firms and their physical store and website (e.g., Flavián et al., 2020; Swoboda & Winters, 2021). In reality, journeys are much more complex than that. They include firm-controlled and non-firm-controlled touchpoints across online and offline channels and are embedded not only in individual but also in environmental (e.g., economic, political) contexts (De Keyser et al., 2020). Thus, a change in priorities — from how firms integrate channels to how customers experience multiple channels — could provide better input to guide integration strategies.

To this end, we ask: What do we know about the customer in omnichannel marketing? 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 article is to reflect on these fundamental questions. We present a critical review of how the customer side has been addressed in omnichannel literature, identify gaps in the extant research, and discuss considerations and paths to fulfill these gaps. More importantly, we delineate why we believe it is time for omnichannel research to embrace not only a customer, but a consumer approach to move the field forward. A consumer approach broadens the current view by moving the focus from customers interacting with a specific firm across online and offline channels to consumers pursuing multilevel objectives in online-offline journeys involving multiple firms and actors (Hamilton & Price, 2019). This shift can provide insights into the broader consumer context, where individuals play multiple roles (e.g., shopper, patient, citizen) and pursue individual and collective higher-order goals (e.g., improving well-being, reducing waste). These insights are fundamental for firms to develop strategies that help consumers meet these goals while assuming their responsibilities to address concerns such as making consumption more sustainable (United Nations, n.d.).

This critical review makes a revising contribution to the marketing discipline (MacInnis, 2011) as it offers a comprehensive evaluation of an emerging research area and introduces a fresh perspective to understanding the customer side of omnichannel marketing. Further, it proposes future research paths to build theory for omnichannel phenomena (Salvietti et al., 2022) and align omnichannel strategies with contemporary consumer issues, thus responding to calls for advancing consumer-based strategies (Hamilton, 2016; Marketing Science Institute, 2020). Hence, we firmly believe that advancing omnichannel marketing as a consumer-based strategy will enhance its theoretical robustness and offer valuable implications for marketing practitioners.

This article follows the spirit of reflection and dialogue of theoretical essays (Barros, 2011; Bertero, 2011; Meneghetti, 2011a; 2011b). We introduce our objectives,

explore the emergence of omnichannel marketing, and define key customer concepts. When analyzing the papers, we found that a myopic view of the customer prevails. To address this, we propose a shift in perspective, from customers to consumers, and discuss its implications. Finally, we outline research paths for the future.

## THE EMERGENCE OF OMNICHANNEL MARKETING

A traditional view defines a channel as a way of selling and delivering merchandise and services to customers (Levy et al., 2013). Reflecting this transaction-focused perspective, omnichannel retailing involves using various channels to sell products or services, “whereby the customer can trigger full channel interaction and/or the retailer controls full channel integration” (Beck & Rygl, 2015, p. 175). Omnichannel allows consumers to choose whatever channel they prefer at any moment, with perceived interaction centered on the brand rather than a specific channel (Piotrowicz & Cuthbertson, 2014).

As functional distinctions blur in omnichannel retailing, the concept of a channel has expanded to include not only transactions but also interactions with customers (Neslin et al., 2006). That is, consumers switch channels and devices not only for purchasing but also for gathering information (Verhoef et al., 2015), urging researchers to broaden the channel scope to include 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 (Lemon & Verhoef, 2016). Internal touchpoints, such as physical stores and websites, offer higher levels of firm control. In contrast, external touchpoints, such as payment platforms and customer forums, are subject to lower levels of control. It is important to note that the internal-external separation is not categorical, but exists on a continuum, allowing firms to have differing degrees of control over partner-owned touchpoints, for example. 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” (Cui et al., 2020, p. 104).

As literature advanced omnichannel conceptualization, research interest moved to channel integration (Mirzabeiki & Saghiri, 2020; Timoumi et al., 2022). Studies demonstrate that omnichannel strategies often improve firm performance. For example, integrating channel functions such as promotion, price, and assortment positively impacts sales growth (Cao & Li, 2015) and cost efficiency (Tagashira & Minami, 2019). Research also indicates that reducing delivery times benefits online and offline sales (Fisher et al., 2019), as well as the use of multimedia advertising (Danaher et al., 2020). Furthermore, scholars explore various internal and external barriers to achieving omnichannel marketing. Picot-Coupey et al. (2016) identify organizational challenges, including cultural change, during the transformation of an e-tailer into an omnichannel retailer. Song et al. (2020) examine the role of human capital, such as skills and interpersonal relationships, in supply chain integration success, while Hajdas et al. (2022) highlight the significance of external factors, such as market and legal environments, in a firm’s potential to implement omnichannel retailing.

The literature makes clear that there is no universal solution for integration. Hence, finding the optimal level of channel integration remains an important issue (Thaichon et al., 2022). In the subsequent sections, we argue that a comprehensive understanding of the customer perspective is essential in addressing this matter.

## KEY CUSTOMER CONCEPTS

Our customer perspective of omnichannel marketing combines two research streams: customer experience and customer journey. Academics and practitioners recognize that understanding customer concepts is crucial to achieving management objectives (Lemon & Verhoef, 2016; Rosenbaum et al., 2017).

Customer experiences are responses to a firm throughout pre-purchase, purchase, and post-purchase phases (Homburg et al., 2017). These responses are subjective and consist of cognitive, emotional, behavioral, sensorial, and social elements (Lemon & Verhoef, 2016; Meyer & Schwager, 2007). Customer experience is the result of 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). It differs from evaluative concepts such as satisfaction and service quality, as it encompasses spontaneous, non-deliberate responses (Becker & Jaakkola, 2020). De Keyser et al. (2020) emphasize three building blocks of customer experience: touchpoints (i.e., individual firm-customer contacts), context (i.e., time and/or place), and qualities

(i.e., attributes of customer responses and reactions). These elements collectively contribute to customers' value judgment.

Closely related to the customer experience, the customer journey represents the process of purchasing specific products or services. It encompasses multiple touchpoints, some of them external to the firm such as partner-owned and customer-owned touchpoints (Lemon & Verhoef, 2016). A hierarchical view of customer journeys considers that they are embedded in a broader system of various actors and activities, with consumers striving to achieve higher-order goals linked to purchase goals (Becker et al., 2020).

## REVIEWING OMNICHANNEL CUSTOMER-FOCUSED PAPERS

Omnichannel marketing objectives are providing a seamless customer experience across touchpoints and optimizing firm performance over channels (Verhoef et al., 2015). As previously noted, firm-focused papers address transformations such as channel addition and integration (Timoumi et al., 2022), thus linked to the second objective of omnichannel marketing. The first objective, however, did not receive the same level of attention. We review this literature to figure out why.

More than just describing past research, literature reviews evaluate the field, provide new insights, and guide future inquiry (Palmatier et al., 2018; Paul & Criado, 2020). Critical reviews prove particularly valuable for emerging topics, as they creatively synthesize and assess current literature, leading to novel perspectives and theories (Snyder, 2019). Although there is no strict standard for critical reviews (Torraco, 2005), authors should transparently communicate criteria for paper selection and analysis, as recommended for any literature review. Next, we describe the procedures for selecting articles and using content analysis methods (Bardin, 2011; Bos & Tarnai, 1999; Seuring & Gold, 2012; White & Marsh, 2006).

Following literature review guidelines (Snyder, 2019), we defined a protocol for searching customer-focused articles in omnichannel literature. Using Scopus database, we searched for empirical articles published between 2011 and 2021 with the terms 'omnichannel' or 'omni-channel' or 'channel integration' and 'customer' or 'consumer' in the title, abstract, or keywords. To focus on high-impact marketing journals, we targeted the top 10 journals in Scopus CiteScore 2020, a free alternative to Web of Science Journal Impact Factor (Harzing, 2022). The journals and scores are *Journal of the Academy of Marketing Science* (17.0), *Journal of Service Research* (14.1), *Journal of Marketing* (12.3), *Journal of Consumer Research* (11.8), *Journal of Retailing* (11.8), *Journal of Interactive Marketing* (11.4), *Journal of Advertising* (11.3), *Journal of*

*Marketing Research* (9.6), *Journal of Business Research* (9.2), and *Journal of Retailing and Consumer Services* (9.0). The first search yielded 50 articles. After reading titles, abstracts, and keywords, we excluded 32 papers outside the analysis scope (e.g., conceptual papers or single-channel empirical papers).

We conducted a qualitative content analysis to interpret the manifest and latent content of articles (Bos & Tarnai, 1999; White & Marsh, 2006). Manifest content came from self-reported information, while latent content was implied by references, frameworks, and methods. The process had three phases based on Bardin (2011): pre-analysis, exploration, and interpretation. In the first phase, we conducted a preliminary reading to ensure articles addressed the customer side of omnichannel marketing. This initial impression was a less structured activity referred to as 'fluctuant reading' (Bardin, 2011). Through iterations, we identified another 11 empirical articles providing contributions into omnichannel customers, albeit using alternative labels such as 'multichannel shoppers' (Frasquet et al., 2019; Harris et al., 2018), 'webroomers,' and 'showroomers' (Fernández et al., 2018; Flavián et al., 2020). As these articles met relevance criteria and were published in high-impact journals, we included them. In total, our final set consisted of 29 articles.

In the second phase, we systematically examined the articles, employing analytical categories to explore manifest and latent content. Following Seuring and Gold's (2012) recommendations, we initially derived categories from existing literature reviews (e.g., objectives, theory, methods, findings). Subsequently, we refined the categories inductively while coding the data, focusing on touchpoint approach and scope, stages of the customer journey explored, and customer outcomes of interest. We documented relevant excerpts and our observations for each category in a spreadsheet. Next, we identified research themes by jointly analyzing at least three categories: objectives, customer outcomes, and findings, grouping the articles accordingly.

In the third phase, we interpreted the spreadsheet, considering each category in relation to essential customer concepts. In the next section, we discuss how this literature answers the question of what we know about the customer in omnichannel marketing.

## A MYOPIC VIEW OF THE CUSTOMER

Despite omnichannel research being a decade old, articles on the customer side are still scarce (see Table 1). We reviewed this literature and grouped the articles around four themes: (1) customer response to omnichannel stimuli, (2) customer decision-making in this environment, (3) new customer behaviors, and (4) omnichannel customer segments.

**Table 1.** Customer-focused empirical papers.

Reference	Research topic	Scope of touchpoints <sup>a</sup>		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
Herhausen et al. (2015)	Customer outcomes of online-offline channel integration	✓		P2	Perceived service quality; Perceived risk; Purchase intention	Experiment	Technology adoption models; Innovation diffusion theory
Blom et al. (2017)	Customer response to omnichannel promotions	✓		P1; P2	Entertainment; Enjoyment; Brand attitude	Experiment	Congruity 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
Flavián et al. (2019)	Webrooming behavior	✓		P1; P2	Confidence; Smart shopping feelings; Search process satisfaction	Interview; Survey; Experiment	Customer experience; Cognitive fit theory
Frasquet et al. (2019)	Customer segmentation by patterns of channel usage to voice complaints	✓		P3	NA	Survey	Customer complaint behavior
Hallikainen et al. (2019)	Customer segmentation by digital touchpoints preference	✓	✓	NS	NA	Survey	Technology readiness; Innovation diffusion theory
Herhausen et al. (2019)	Customer segmentation by touchpoints usage	✓	✓	P1; P2	Satisfaction; Loyalty	Survey	Anticipated utility theory
De Vries and Zhang (2020)	Customer response to channel migration stimuli	✓		P1; P2	Likelihood to switch channels	Experiment	Theory of psychological reactance
Farah and Ramadan (2020)	Customer response to omnichannel solutions	✓		NS	Purchase impulsiveness; Affective experience; Word-of-mouth	Survey	Customer experience
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
Miquel-Romero et al. (2020)	Customer choice of channels to voice post-purchase 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
Tyrväinen et al. (2020)	Customer response to omnichannel personalization	✓		NS	Cognitive and emotional experience; Word-of-mouth; Purchase intention	Interview; Survey	Customer experience
Valentini et al. (2020)	Customer segmentation by channels used to procure and use promotions	✓	✓	P1; P2	NA	Survey	Motivation-opportunity-ability framework
Dahl et al. (2021)	Customer response to omnichannel information	✓	✓	NS	Health self-awareness	Survey	Service dominant logic
Fiestas and Tuzovic (2021)	Showrooming behavior	✓	✓	P1; P2	NA	Interview	Theory of planned behavior
Gao and Huang (2021)	Customer response to omnichannel integration quality	✓		NS	Engagement; Loyalty	Survey	Customer engagement

Continues

**Table 1.** Customer-focused empirical papers (continued).

Reference	Research topic	Scope of touchpoints <sup>a</sup>		Stages of the customer journey	Customer outcomes	Methods	Theoretical background
		Int.	Ext.				
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
Mencarelli et al. (2021)	Customer response to e-channel combinations	✓		P3	Perceived value	Survey	Customer journey
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 toward online and offline channels	✓		NS	Loyalty	Survey	Categorization theory
Tuanrat et al. (2021a)	Customer segmentation by channel choice	✓		P1; P2; P3	Satisfaction	Survey	Customer journey

Note. NS = Not specified; NA = Not applicable; P1 = Pre-purchase; P2 = Purchase; P3 = Post-purchase. <sup>a</sup>Internal touchpoint = controlled by the firm; External touchpoint = not controlled by the firm.

The first group examines customer response to omnichannel stimuli, such as uniformizing the retail mix across channels (Goraya et al., 2020; Huré et al., 2017), integrating information access (Herhausen et al., 2015), and promoting consistency and transparency of services (Quach et al., 2020). These studies provide insights into how firms can use omnichannel strategies to positively influence outcomes such as shopping value perceptions (Huré et al., 2017), purchase intention (Herhausen et al., 2015; Tyrväinen et al., 2020), and customer loyalty (Gao & Huang, 2021; Swoboda & Winters, 2021).

The second group explores customer decision-making in omnichannel environments. This group is more customer-oriented than the previous one, as it addresses the influence of psychographics and situational factors. For instance, Hu and Tracogna (2020) focus on the determinants of different customer journeys, including the need for information, shopping innovation, and convenience. Harris et al. (2018) explore the customer motivations to configure their journeys and shed light on the higher-order goals that they pursue (e.g., being a good citizen). Other papers examine how customers choose channels for interacting with firms (Barwitz & Maas, 2018; Miquel-Romero et al., 2020).

The third group focuses on new customer behaviors resulting from channel combinations. 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 from this group 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). In the luxury consumption context, webroomers value the usefulness of online channels to gather information but choose the

physical store to touch and feel high-end products and 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). Both behaviors influence customer perceptions and feelings of shopping in a smart way (Fiestas & Tuzovic, 2021; Flavián et al., 2019, 2020).

The fourth group encompasses segmentation studies based on channel usage patterns. For example, Tuanrat et al. (2021a) and Herhausen et al. (2019) explore satisfaction in different customer segments. Tuanrat et al. (2021a) argue that omnichannel customers are more sensitive than single-channel segments. In the same vein, Herhausen et al. (2019) show that satisfaction with the journey is more relevant than product satisfaction for omnishoppers. Valentini et al. (2020) find that customers who use online and offline channels respond more strongly in consumption than single-channel customers. Moreover, Hallikainen et al. (2019) explore the relevance of technology readiness in customer segmentation based on digital touchpoints. Overall, these papers provide valuable insights into the behaviors and characteristics of omnichannel customer segments.

However, a closer look at Table 1, beyond the research themes, reveals a myopic view: (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 have not been fully addressed.

First, the majority of papers from Table 1 focus on the customer response to omnichannel stimuli, in line with the definition of customer experience (Homburg et al.,

2017). However, an examination of the authors' approach to customer outcomes indicates that they often fail to delve into how customers react to omnichannel stimuli. Although undeniably relevant, papers from [Herhausen et al. \(2015\)](#) and [Tuanrat et al. \(2021a\)](#) are examples of a superficial approach as they investigate evaluative concepts (i.e., perceived service quality, satisfaction) as customer outcomes. 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 customers' response.

Nonetheless, there are exceptions. For instance, [Tyrväinen et al. \(2020\)](#) and [Gao, Fan et al. \(2021\)](#) explore experiential responses to the integration of online and physical stores. They show that integrating functions (e.g., promotion, price, customer data) positively influences customer cognitive and emotional reactions, leading to an increase in purchase intention. In the same vein, [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).

Second, Table 1 shows that the scope of touchpoints investigated in these papers is surprisingly narrow. The majority of the papers focus only on touchpoints that occur through physical and online stores ([Blom et al., 2017](#); [Goraya et al., 2020](#); [Huré et al., 2017](#); [Swoboda & Winters, 2021](#)). Others analyze firms' official profiles on social media ([Frasquet et al., 2019](#); [Miquel-Romero et al., 2020](#)). Few papers look at external touchpoints. Exceptions address search engines ([Herhausen et al., 2019](#); [Li & Kannan, 2014](#)), comparison and review websites ([Barwitz & Maas, 2018](#); [Hu & Tracogna, 2020](#)), earned media ([Fernández et al., 2018](#); [Valentini et al., 2020](#)), and word-of-mouth from friends and family ([Herhausen et al., 2019](#); [Hu & Tracogna, 2020](#)). Only [Herhausen et al. \(2019\)](#) add competitors to the scope of channels under consideration.

Third, customer literature in omnichannel marketing has been exploring mainly the pre-purchase and purchase stages of the journey, thus focusing on customer activities such as search, order, and payment, that happen in firm-controlled touchpoints. As Table 1 shows, few papers explore activities in the post-purchase phase when customer-controlled touchpoints became relevant for activities such as consumption and engagement ([Lemon & Verhoef, 2016](#)). Nonetheless, papers that address post-purchase moments such as complaints ([Frasquet et al., 2019](#); [Miquel-Romero et al., 2020](#)) and product usage ([Mencarelli et al., 2021](#)) still only focus on internal touchpoints. These observations reinforce the existence of a gap in the post-purchase stage ([Tuanrat et al., 2021b](#)).

In sum, customer-focused omnichannel literature so far provides valuable insights. However, a closer look at this body of research reveals 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 post-purchase stage. In the same spirit as [Levitt's \(1960\)](#) call for firms to overcome marketing myopia and be customer-centric rather than product-centric, we believe there is room for substantial progress in the literature if researchers broaden their perspective on the customer.

## THE NEED FOR A CONSUMER PERSPECTIVE

Omnichannel strategies aim to enhance the customer experience, which is a subjective and context-specific process ([Becker & Jaakkola, 2020](#)). To achieve this goal, marketers and scholars need to adopt a customer-centric perspective. However, previous customer-centric studies have had a narrow focus, limiting themselves to moments when customers interact with specific firms while ignoring the impact of a broader context on such interactions ([De Keyser et al., 2020](#)). To fill this gap, we propose that omnichannel marketing research needs to adopt a consumer perspective (Figure 1).

It is worth distinguishing two concepts that are often used interchangeably. Customers have a relationship with a specific organization (e.g., a pharmacy chain) and are motivated by more concrete goals, such as getting medication. Consumers have contact with multiple actors (e.g., various pharmacy chains, healthcare providers, other consumers) and are motivated by more abstract goals, such as feeling good ([Hamilton & Price, 2019](#)). Abstract goals reflect not only an individual context, but also societal issues ([De Keyser et al., 2020](#)).

Researchers have called for a more consumer-centric view of the journey to foster the development of consumer-based organizational strategies ([Hamilton, 2016](#)). This means shedding light on the different roles that individuals play (e.g., patient, consumer, producer), their multiple interactions with other consumers, firms, and objects over time, and the sociocultural context of value creation ([Hamilton & Price, 2019](#); [Schau & Akaka, 2021](#)).

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. Because consumer insights are not specific to one firm, a consumer perspective on omnichannel could help researchers understand how consumers react to a variety of stimuli in their customer and consumer journeys.

	Omnichannel perspective based on...	
	Customer	Consumer
Entities and relationships		
Process		
Substantive domain	Individuals interacting with a specific firm across multiple touchpoints to achieve concrete purchase goals	Individuals interacting with various actors across multiple touchpoints to achieve abstract higher-order goals
Conceptual domain	Customer journey; Firm-controlled touchpoints and channels; Evaluative outcomes	Consumer journey; Firm-controlled and non-firm-controlled touchpoints; Multidimensional experiences
Methodological domain	Emphasis on descriptive research designs	Emphasis on exploratory research designs

**Figure 1.** Customer vs. consumer perspective.

Source: Developed by the authors.

How this perspective could help advance omnichannel research? To answer this question, it is important to reflect on how knowledge expands in a discipline. We do so by following the framework proposed by [Brinberg and McGrath \(1985\)](#). According to them, the research process is 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](#)).

### SUBSTANTIVE CONSIDERATIONS

The substantive domain comprises practical issues that need to be explored ([Grewal et al., 2016](#)). It refers to real-world phenomena, such as actors behaving in some context and patterns of events — in other words, “what is ‘there’ prior to and independent of the intellectual enterprise we call research” ([Brinberg & McGrath, 1985, p. 33](#)).

From a customer perspective, the substantive domain of omnichannel marketing includes individuals who are on a customer journey across multiple touchpoints with a specific firm and its partners to purchase products or services ([Lemon & Verhoef, 2016](#); [Salviotti et al., 2022](#)). These phenomena evolve around concrete purchase goals and are influenced by situational factors such as journey duration and risk

perception (Herhausen et al., 2019; Shankar & Jain, 2021). In contrast, a consumer perspective considers individuals who are on consumer journeys that involve multiple touchpoints with various firms and other actors to achieve higher-order goals linked to concrete goals (Becker et al., 2020; Hamilton & Price, 2019). These phenomena are embedded in larger contexts (e.g., social, environmental) that influence consumer behavior (De Keyser et al., 2020).

It is important to identify omnichannel phenomena from the consumer's point of view to advance knowledge in the substantive domain. For example, previous literature has focused on how consumers use a given retailer's online and offline stores to search and purchase, limiting insights to a market context. Less is known about consumer behaviors, such as picking up products bought online at a physical location (Ortlinghaus & Zielke, 2019), or returning online purchases to a physical store (Robertson et al., 2020), that have broader implications (e.g., reducing the carbon footprint of each purchase). It is also worth analyzing the actors that influence the consumer experience beyond specific firms, as consumers rely on a much larger set of external actors to achieve concrete and abstract goals, from other consumers to artificial intelligence. Thus, the study of omnichannel phenomena should integrate social influences such as 'traveling companions' (Hamilton et al., 2021) and collective journeys (Thomas et al., 2020).

## CONCEPTUAL CONSIDERATIONS

The conceptual domain encompasses theoretical frameworks that connect various concepts underlying a particular phenomenon (Grewal et al., 2016). It is the abstract representation of substantive phenomena in terms of their attributes or properties, which, in turn, are guided by theories and paradigmatic assumptions (Brinberg & McGrath, 1985).

From a customer perspective, the conceptual domain of omnichannel marketing is based on the customer journey as a process in which customers interact with a firm using multiple touchpoints (Lemon & Verhoef, 2016; Verhoef et al., 2015). These touchpoints occur across online and offline channels that are managed in a synergistic, integrated manner (Cui et al., 2020; Neslin, 2022). As the focus is on the contact between the customer and a specific firm, touchpoints are conceptualized as owned or controlled by the firm (or its partners) or independent (De Keyser et al., 2020; Lemon & Verhoef, 2016). Furthermore, the conceptual domain includes evaluative outcomes of such contacts that are of interest to a specific firm (e.g., service quality perceptions, customer satisfaction). In contrast, a consumer perspective expands the conceptual domain to the consumer journey, which is based on consumers' goals rather than their relationship with a firm (Hamilton & Price, 2019; Schau & Akaka, 2021). As such, it

helps broaden the conceptual domain of touchpoints beyond a specific firm to emphasize, for example, consumer-to-consumer interactions (Verhoef et al., 2015). It also shifts the focus from evaluations to experiences, which are the internal processes that shape evaluations (De Keyser et al., 2020).

Table 1 shows that researchers have used a variety of theoretical backgrounds borrowed from other disciplines (e.g., psychology, sociology) to study the customer in omnichannel marketing. However, recent developments in the marketing discipline, such as the concept of consumer journeys, can help advance models and theories to explain and predict consumers' omnichannel attitudes and behaviors (Salviati et al., 2022) and even develop organic marketing theories (Hunt, 2020; Zeithaml et al., 2020).

## METHODOLOGICAL CONSIDERATIONS

The methodological domain comprises techniques and data (Grewal et al., 2016). It refers to the methods to interpret phenomena, including the modes of treatment of variables (e.g., scales) and the procedures to examine the relations among them (e.g., regression analysis) given a research strategy (e.g., experiment, survey) (Brinberg & McGrath, 1985).

Omnichannel marketing from the customer perspective has been focused on describing phenomena using elements from the substantive and conceptual domains. As Table 1 shows, the majority of studies have employed surveys, using new or adapted scales and conceptual models to test relationships between variables (e.g., perceptions and evaluations of omnichannel). However, this strategy may not be appropriate to study new and complex phenomena and to capture subjective concepts such as consumer goals. Therefore, shifting to a consumer perspective means giving space to exploratory research designs that allow for free expression and better cover processes that unfold over time. Exploratory research can be associated with the analysis of secondary data from multiple sources to capture consumer information throughout the journey (Li & Kannan, 2014).

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

## RESEARCH PATHS FOR DEVELOPING CONSUMER-BASED OMNICHANNEL MARKETING

Each path for the research process is a combination of two domains with an application in the third domain (Brinberg & McGrath, 1985). Following this framework, we propose a research agenda based on three paths for developing

consumer-based omnichannel marketing: theoretical, experimental, and empirical.

### 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 by 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 (consumer) journeys and omnichannel marketing, as “conceptual thinking is at the heart of the scientific enterprise” (MacInnis, 2011, p. 141). There is room to improve the conceptualization of omnichannel experiences and journeys (Barwitz & Maas, 2018; Gasparin et al., 2022; Gao, Fan et al., 2021). 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 experience manifest in omnichannel settings, as well as what constitutes extraordinary and ordinary experiences in this environment. It is also worth exploring the relationship between customer experience and evaluative concepts such as channel integration quality (Gao & Huang, 2021), as well as examining how customers perceive their movement across touchpoints (Huré et al., 2017).

In addition, the theoretical path involves exploring what is new to consumer behavior as a result of major shifts in contextual factors. Thus, researchers could draw from different disciplines to develop theoretical models aimed at explaining omnichannel consumer phenomena given contemporary themes such as hyperconnectivity (Swaminathan et al., 2020) and sustainable consumption (White et al., 2019). Examples of questions include: How does being connected to multiple online and offline channels impact consumer decision-making? Can omnichannel strategies enable consumers to choose more sustainable last-mile delivery options?

Findings of the theoretical path should help retailers take a more active role in driving experiences and behaviors by mapping ways to reach customers across multiple media and channels at different stages of the journey. Hence, they can better identify where the customer is in the journey when they connect with specific touchpoints and which consumer goals are active. For example, firms can provide cross-channel guidance on product disposal or recycling, which are often neglected post-purchase touchpoints.

### Experimental path

In the experimental path, researchers combine elements and relations from the conceptual and methodological domains to design a study. Then, they implement the design by selecting phenomena from the substantive domain (Brinberg & McGrath, 1985). In other words, this path involves associating theories and constructs with 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 marketing. For instance, the extant literature exploring the customer perception of channel integration issues is conceptually fragmented into perceived channel integration (Zhang et al., 2018), service integration (Quach et al., 2020), channel integration quality (Gao & Huang, 2021), and effective customer journey design (Kuehnl et al., 2019). Future studies would benefit from a unified measurement of integration (Neslin, 2022).

Moreover, the touchpoint concept should be explored beyond an extension of retail channels (Herhausen et al., 2019) so that 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 a specific firm from dissatisfying points in the journey (Kranzbühler et al., 2019). Researchers could better understand the interplay between touchpoints within and outside the firm’s control. In addition, an in-depth investigation of omnichannel journeys 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 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 firms remove barriers across channels.

### 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 with methods to make empirical observations and develop concepts (Grewal et al., 2016).

Future research should track real-time omnichannel journeys to determine how the 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 (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 harmful effects of omnichannel marketing. 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 a pillar of omnichannel strategies (Palmatier et al., 2020; Timoumi et al., 2022). 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 (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 environments, which can help managers 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).

## CONCLUSION

This paper critically reviews the customer-focused omnichannel literature and finds that a myopic view

prevails. Specifically, existing research superficially addresses customer response to omnichannel stimuli and focuses on interactions with a single firm, mostly in the pre-purchase and purchase stages of the customer journey. We argue that this view is disconnected from the complex landscape of touchpoints that surrounds customers and also ignores the larger context in which the contacts occur.

To overcome this myopic view, we propose that researchers should adopt a consumer rather than a customer perspective on omnichannel marketing. Such a perspective emphasizes that individuals have multidimensional (e.g., affective, cognitive) reactions to stimuli during their customer journeys, which need to be further understood in light of other consumer motivations, such as living more sustainably. It also departs from the relationship with a single firm, as consumers interact with multiple actors within and outside the firm's control at all stages of the journey.

This shift in perspective has several implications for understanding holistic channel management. In the substantive domain, researchers need to identify consumer phenomena that encompass multiple touchpoints with different actors and broaden the range of outcomes studied. In doing so, research can provide insights not only for the market context (e.g., how to improve satisfaction across channels), but also for the environmental context (e.g., how to promote sustainable consumption across channels). In the conceptual domain, the focus should shift from evaluations and concrete purchase goals to experiences and abstract goals so that consumer-based strategies can help consumers achieve them. In the methodological domain, the consumer experience should be at the heart of the research design.

This article offers 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 phenomena, and, more importantly, using this knowledge to inform strategic decisions so channel integration can serve not only performance objectives but also the greater challenges of today's world.

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## Data Availability

The authors claim that all data used in the research have been made publicly available through the Harvard Dataverse platform and can be accessed at:



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