

Omnichannel: an Overview of Multiple Channel Research and Trends for the Future

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Resumo

Considered as the evolution of multichannel, the omnichannel strategy presupposes the simultaneous management of marketing channels and integrated contact points between clients and companies. Studies on the subject are recent, but they attract more and more academics and retail professionals. Aiming to present the state of the research in omnichannel, we first identify conceptual differences between multi, cross and omnichannel. Next, we highlight the research contributions made so far on four broad topics: channel integration, physical store role, supply chain management, and consumer behavior. Finally, we point out subjects to be deepened in future studies.

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ABSTRACT

Considered as the evolution of multichannel, the omnichannel strategy presupposes the simultaneous management of marketing channels and integrated contact points between clients and companies. Studies on the subject are recent, but they attract more and more academics and retail professionals. Aiming to present the state of the research in omnichannel, we first identify conceptual differences between multi, cross and omnichannel. Next, we highlight the research contributions made so far on four broad topics: channel integration, physical store role, supply chain management, and consumer behavior. Finally, we point out subjects to be deepened in future studies.

Keywords: marketing channels; omnichannel; cross-channel; retail.

1 INTRODUCTION

Nowadays, besides physical stores and catalogs, customers have access to channels such as e-commerce, mobile applications, kiosks, social networks, etc. They do not choose one or the other, but move through the channels, preferring the most convenient for each moment. Buyers search the product on physical stores and simultaneously on their mobile devices, looking for more information, reviews, and lower prices. If they find a good offer, they can even purchase online at the same time, inside the store. The opposite also happens: consumers look for information online and then go to physical stores to buy.

It is in this context of inconspicuous borders between online and offline that the term omnichannel appeared, considered as an evolution of multichannel strategy. Multiple channel integration is the core strategy for satisfying customers who want both physical and digital experiences, to seek efficiency and also reduce double efforts and conflicts of retailers that operate their channels separately (Rigby, 2014).

Thus, companies are able to facilitate the opening (and closure) of stores, offer more delivery options to customers and reduce logistics costs (Cao, 2014; Kumar, Anand, & Song, 2017). Expanding online shopping options does not mean reducing traffic in physical stores if companies offer conveniences developed especially for those points. The physical store, with its new role, and the online one coexist and even prosper together (Avery, Steenburgh, Deighton, & Caravella, 2012).

Over the last decade, research into multichannel management has grown with the evolution of e-commerce and the appearance of other digital channels, such as mobile. Recently, it gained even more projection with the emergence of omnichannel (Verhoef, Kannan, & Inman, 2015).

Deep changes in retailing will be subject of further investigation as they are related to research priorities (Marketing Science Institute, 2016). Thus, the need for greater understanding of the evolution from multi to omnichannel is justified. This paper aims to present an overview of the studies about omnichannel, with the subjects already investigated and suggestions for the future.

2 FROM MULTI TO OMNICHANNEL: AN EVOLUTION

A marketing channel is the set of interdependent organizations involved in the process of making a product or service available to the consumer (Palmatier, Stern, & El-Ansary,

2014). From another perspective, Neslin *et al.* (2006, p. 96) have defined channel as "a customer contact point, or a medium through which the firm and the customer interact".

The theme became even more relevant with the expansion of the marketing channels due to the growth of internet. At first, the research focused on the parallel management of more than one channel (multichannel). Then, with technological advances, it began to deal with the integration between channels (cross and omnichannel). The main differences between the concepts are discussed below.

2.1 Multichannel

Neslin *et al.* (2006, p. 96) have defined multichannel customer management as "the design, deployment, coordination, and evaluation of channels to enhance customer value through effective customer acquisition, retention, and development". According to them, multichannel management is a customer-centric marketing function, a different approach from traditional sales channel research, which focuses more on the company and the distributors.

In the multichannel strategy, the channels are not interconnected: they are managed by different teams, with separate goals and schedules, and without data sharing (Mirsch, Lehrer, & Jung, 2016). As reported by Verhoef *et al.* (2015), researchers interested in the multichannel strategy have been studying the impacts of the growth of online channels (e-commerce) on offline channels (physical stores) and on traditional direct channels (catalogs). Customer migration from one channel to another, consumer behavior on each channel, and impacts on customer loyalty and company profitability are among the issues investigated.

Several authors agree that a multichannel client has a higher Customer Lifetime Value (CLV) than one who uses only one channel (Kumar, Shah, & Venkatesan, 2006; Neslin & Shankar, 2009). But Kushwaha and Shankar (2013) have shown that the positive relationship between multichannel customer preference and the monetary value spent is stronger for hedonic products, such as clothing and cosmetics.

2.2 Cross and Omnichannel

The growth of e-commerce and the development of new technologies have led to the emergence of new channels. Thus, researchers began to consider cross-channel behaviors, that is, involving more than one channel in the process of buying the same product or service. More recent studies focus on an omnichannel context, in which there are no delimited boundaries between channels. Although often used as synonyms, there are differences between the two concepts (Figure 1).

Both cross-channel and omnichannel indicate interaction and integration, but in different levels. Beck and Rygl (2015) have proposed a taxonomy in which the cross-channel strategy refers to the partial integration of channels, when the client can switch between specific channels, but not all of them. Channel management in cross-channel strategy is still done separately (Mirsch *et al.*, 2016).

However, in the omnichannel strategy, the company removes the barriers to movement between channels, allowing customers to use whatever channel they prefer and at any stage of the journey. To make this holistic experience possible, channel management must be integrated (Beck & Rygl, 2015; Mosquera, Pascual, & Juaneda-Ayensa, 2017).

Rigby (2011) has stated that the term omnichannel reflects the fact that retailers can interact with customers through countless channels, and that customers benefit from the combined advantages of physical stores (personal service and interaction with products) and online stores (wide selection of items, richness of information, reviews and tips).

Thus, Verhoef *et al.* (2015, p. 3) have defined omnichannel as "the synergetic management of the numerous available channels and customer touchpoints, in such a way that the customer experience across channels and the performance over channels is optimized". According to Brynjolfsson, Hu and Rahman (2013), the retail sector shifts from a model focused only on transactions and deliveries towards a "concierge" model oriented to assist the consumer.

Figure 1. Differences between Multi, Cross and Omnichannel

Feature	Multichannel	Cross-channel	Omnichannel
Channel scope	Website, mobile, physical stores and catalogs	Website, mobile, physical stores, catalogs, kiosks, social networks and customer contact points	Website, mobile, physical stores, catalogs, kiosks, social networks and customer contact points
Objectives	Per channel	Per channel or per connected channels	Together
Management	Separated per channel	Separated per channel or connected channels	Integrated
Channel integration	No	Partial	Total
Sharing data	No	Only between connected channels	Yes
Perceived interaction	With the channel	With the channel	With the brand

Source: Adapted from Mirsch *et al.* (2016), Mosquera *et al.* (2017) and Verhoef *et al.* (2015).

After an overview of the emergence of the omnichannel concept, we will see that it has been subject of only a few studies by the academy. Therefore, we gathered the main findings until now and raised points for future investigation.

3 RESEARCH STATUS IN OMNICHANNEL

The academic research in the omnichannel strategy is still in its infancy, although it has gained prominence in important journals. The omnichannel strategy is also one of the research priorities for 2016-2018: the Marketing Science Institute encourages researchers to investigate how "Individuals and organizations interact through many channels, on multiple screens and devices, across a myriad of touchpoints and over time" (MSI, 2016, p. 4).

In order to understand the state of the research in omnichannel, we selected the four more often researched themes related to it, and highlighted the authors contributions. Due to the reduced space, we discuss only the most relevant findings.

3.1 Channel integration

According to Piotrowicz and Cuthbertson (2014), the main challenge is how to integrate channels in the omnichannel context. It is not possible to evolve directly from multichannel silo management to a fully integrated one without first facing strategic challenges, such as managerial and resource challenges, and then development, such as information systems and relationship with customers (Picot-Coupey, Huré, & Piveteau, 2016).

Thereby, the amount and scope of information technology investments positively impact the retailer's cross-channel capabilities (Luo, Fan, & Zhang, 2016). Cao (2014) has suggested that companies follow steps from multichannel adoption with independent business models for each channel to full integration and a new business model for the company.

An initial form of integration that many retailers adopt is to offer the customer the possibility to buy online and pick up in store (BOPS). Gao and Su (2017) have warned, however, that not all products are suitable for that strategy. Items that sell well in physical stores, for instance, are not nominated for BOPS because the strategy can lead consumers of these items to purchase online and consequently reduce traffic in stores.

Regardless of the modalities and level of channel synchronization, the research so far has suggested positive results in several areas. Cao and Li (2015) have found a positive influence of cross-channel integration on sales growth as companies that are able to coordinate multiple channels can improve consumer confidence, increase loyalty, drive conversion rates, and create opportunities of cross-selling. In an analysis of the channel integration of a European clothing retailer, Frassetto and Miquel (2017) have confirmed a positive impact on customer loyalty in both online and offline channels as well as satisfaction.

For some retailers, the adoption of an omnichannel strategy implies in adding channels (physical or online) to the portfolio, which is never simple. But the investment seems to be worth it, since it has a positive effect on the company's market value, especially for organizations in a highly competitive scenario (Homburg, Vollmayr, & Hahn, 2014). Also, adding physical stores to the channel portfolio can increase the revenue and the customer retention (Pauwels & Neslin, 2015). Cannibalism between some channels may occur in the short term; however, over time, the channels begin to interact and reinforce each other, which leads to an increase in sales in all of them (Avery *et al.*, 2012; Fornari, Fornari, Grandi, Menegatti, & Hofacker, 2016).

3.2 Physical store role

Equipped with new technologies and accessible by consumers' phones, physical stores in an omnichannel strategy connect different channels and shift their focus from products to customer experience. As a result, Chatterjee and Kumar (2017) have found that consumers of durable products are willing to pay higher prices for similar products on sites of omnichannel retailers than in purely online retailers because of the ease of return in physical stores. According to Bernon, Cullen and Gorst (2016), the omnichannel retailer that develops a solution that facilitates the return of products will be able to differentiate itself from competitors.

3.3 Supply chain management

The closer relationships in omnichannel era also have impact on the dynamics of the supply chain. As stated in Ishfaq, Defee, Gibson, & Raja (2016), companies are focused on partnering with a major group of suppliers to expand online product offerings relative to those sold in stores. This way, suppliers directly meet to some requests from the retailer's customers, so the retailer does not necessarily need to increase their distribution capacity or store size.

The larger assortment online than offline is one of the multi to omnichannel transition propositions elaborated by Hübner, Wollenburg and Holzapfel (2016). Selling a few items exclusively online induces "pseudo-showrooming", a behavior in which the consumer inspects the product in the physical store before buying a similar one in the same retailer's online store (Gu & Tayi, 2017).

Gallino, Moreno and Stamatopoulos (2017) have shown that the introduction of the "Ship-to-Store" mode — to send missing products at no cost for the customer to the nearest store — increases sales dispersion. However, offering more delivery options helps building loyalty in the long term. The result is in agreement with market participants, who said that the expansion in the forms of delivery and the increase in the speed and level of services are relevant to achieve excellence in omnichannel distribution (Hübner, Holzapfel, & Kuhn, 2016).

3.4 Consumer Behavior

Another point of interest in omnichannel research is consumer behavior, since there are more channel options and wider possibilities of customization.

In a study with omnishoppers, Juaneda-Ayensa, Mosquera and Murillo (2016) have verified that among the determinants for the intention to buy using different channels are factors such as personal innovation (to be pioneer in the use of new technologies) and expectation of ease (the maximization of convenience). Also, Murfield, Boone, Rutner and Thomas (2017) have shown that punctuality is the most important aspect of service to bring satisfaction and loyalty to consumers using integrated channel modes (BOPS and buy-in-store-ship-direct). At this point, they differ from other customers, who evaluate multiple attributes, such as availability and product conditions.

The increase in purchase via mobile also motivated research about the influence of new technologies on consumer behavior. Rodríguez-Torrico, Cabezudo and San-Martín (2017) have observed that impulsive omnichannel clients use mobile devices to make decisions — the device is the ideal to satisfy urgent needs —, while more cautious customers opt for desktop websites, because of detailed information and better connection.

About mobile strategies, Park and Lee (2017) have noted that SMS and push messages from retailer Apps influence the choice of the mobile channel for purchases and that products that have experience characteristics tend to be purchased by mobile if it offers detailed information, such as reviews.

Although the omnichannel academic research is recent, the investigations up to the moment point to an encouraging future, as we will see in the next item.

4 FUTURE INVESTIGATIONS ON OMNICHANNEL

In the following topics related to omnichannel, we list the ones we consider the most relevant to future investigations. Given the speed of the development and adoption of new technologies, it will be necessary to obtain answers to important questions in the near future.

4.1 Technological innovations

Augmented reality, virtual fitting rooms, and other newly integrated retail technologies are under investigation because of their impact on the buying journey, consumer decision-making, and business relationship with customers (Beck & Crié, 2018). There are, however, other innovations with potential to revolutionize consumption that will require even more dedication from researchers.

One example is the Internet of Things (IoT), which turns physical products into intelligent objects. Although IoT creates value for the customer and offers superior experience according to Balaji and Roy (2017), there is a resistance to highly connected products, mainly due to perceived intrusiveness and concern for privacy, as Mani and Chouk (2017) have observed. The researches in the area, therefore, must deal with issues such as the balance

between personalization and privacy (Grewal, Roggeveen, & Nordfält, 2017) and the extent to which the greater volume of communication between the company and the consumer through different channels is positive (Godfrey, Seiders, & Voss, 2011).

Considering the smart product as another point of contact between the brand and the customer, there will be access to detailed information about their use and consumer habits. How will this data be used? What are the ethical issues involved? How can such access be positively perceived? How will these changes impact loyalty?

Another innovation is the Cognitive Computing (CC), that is, systems that understand data, learn without programming, and interact with humans. Some retailers, such as Macy's, Sephora and Staples, use CC to make more personalized recommendations for their customers and automate orders for vendors (IBM, 2017). But there is little research on the topic, as noted by Wedel and Kannan (2016). Thus, deep research on CC and marketing can answer questions such as: What is the level of accuracy of the insights generated via CC? How does its use affect purchase decision making and channel management? How can CC help retailers gain competitive advantage? Are customers willing to interact with this technology?

4.2 Big data

Big data is one of the major research trends in marketing channels and it is supposed to help companies customize their relationship with customers in different channels, since multiple customer contact points allow access to behaviors and preferences in a more effective way (Grewal *et al.*, 2017). Research can also support professionals to build a portfolio of metrics on channel coverage, contributions from all partners, and sustainability of partnerships (Ailawadi & Farris, 2017).

The need to deepen the investigations on big data is even more evident in an Internet of Things scenario. Bradlow, Gangwar, Kopalle, and Voleti (2017) have argued that it is not only an increase in the volume of data, but also a "better data" from a diversification of sources of information and application of intelligent analysis tools. At this point, what are the possible contributions of CC? What models will be used to analyze an even greater volume of data? How to get individual and real-time insights from big data?

4.3 Mobile marketing

Future research should deepen the differences between mobile and other online channels, since mobile devices are linked to specific buying behaviors. For example, Narang and Shankar (2016) have found that retailer application users often buy 21% more than non-users, which is in line with Wang, Malthouse and Krishnamurthi's (2015) earlier finding of increased orders per year from customers who purchase via mobile.

Another issue is how to provide each customer appropriate information in the right time and context. The answer to that may be linked to the relationship between consumers and their mobile devices, so it is essential to understand the impact of mobile on the behavior throughout the purchase journey (Shankar *et al.*, 2016). From this, one can answer questions such as: How should the design of apps be to influence the shopping journey? Does the use of devices change the relationship between the salesperson and the customer? How should mobile conversion metrics be? How do mobile payment technologies such as Android Pay affect purchase decision making?

4.4 Social Networks

In line with the spread of mobile consumption, there is the growing role of social networking sites, such as Facebook, as an e-commerce platform. The combination of online store with a social environment is the object of social commerce research (Liang & Turban, 2011), a new and growing research area. Social commerce studies should become especially relevant to marketing because of its impact on branding, trust building and co-creation of value (Elsevier, 2017).

Lamberton and Stephen (2016) have advocated new analytical techniques, combined with behavioral theories, and creative methods that can help researchers understand the immersive experiences that consumers have with social networks, especially the millennials (aged 16-34), who use these platforms to validate their intentions of purchase (Hall & Towers, 2017). How can companies monitor their value on external platforms and improve their performance? Which are the effective strategies for connecting brands and consumers in environments marked by social interactions? What is the impact of influencers over time?

4.5 Consumer behavior

The consumer behavior in the simultaneous use of channels is another subject that should attract researchers to the omnichannel, since this is a point of great interest in the multichannel (Valentini, Montaguti, & Neslin, 2011). From this, the focus should be on modeling behaviors of choice of multiple channels and points of contact simultaneously, which may help to answer questions such as: Do specific points of contact create preference for specific retail channels? What guides the simultaneous choice of contact points and channels?

Another issue that deserves attention in an omnichannel context is loyalty. Melis, Campo, Breugelmans, and Lamey (2015) have shown that, as the online shopping experience increases, consumers switch between online channels from different retailers, which means that they become less loyal over time. With an even greater facility for exchanging channels in an omnichannel era, but also fewer distinction between online and offline, what happens with loyalty? If in the multichannel the physical store tends to lose importance to the consumer, what happens in the omnichannel?

Finally, Kumar *et al.* (2017) have suggested changes in how satisfaction is measured and ask for retailers to check their customers' satisfaction at different points of the buying journey, rather than merely measuring overall satisfaction. How can satisfaction be measured at each point of contact? How do differences in channel satisfaction impact the future channel choice?

5 CONCLUSION

With the development of technologies that admit people to be fully connected to the Internet, the borders between physical and digital have been disappearing. In a rising omnichannel era, marketing channels are unified and managed together, which allows retailers to offer seamless shopping experiences. In a highly competitive environment, integrating channels is already a prerequisite to stay in contest, no longer a distinguishing factor (Grewal *et al.*, 2017).

An evolution of the multichannel strategy, omnichannel is a recent theme. Therefore, there is still much progress to do. Among the topics already researched are channel integration, physical store role, supply chain management, and consumer behavior. The first

studies generated valuable insights for academics and practitioners and should motivate more research, mainly related to the impacts of new technologies, such as the Internet of Things.

The multidisciplinary nature of the omnichannel represents a great opportunity to diversify the research methods for future investigations, and to stimulate more cooperation between areas. Krafft, Goetz, Mantrala, Sotgiu, and Tillmanns (2015), for instance, have suggested a greater openness in large journals for research with more qualitative and experimental approaches. To assist in the understanding of new scenarios, investigations must also reflect the dynamism of the omnichannel strategy.

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