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## Omni-channel retailing: some reflections

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### ABSTRACT

In this paper, I discuss some reflections on the emerging literature on multi- and omni-channel retailing. I discuss four important areas of prior research and briefly describe some general findings. Next, I consider three important emerging trends: 1) digital only, 2) Covid-19 effects and 3) New Technologies. I discuss the implications of these trends for omni-channel retailing and provide some ideas for future research on these trends.

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## Introduction

When I started my academic career in the mid-'90s of the past century, I would never have imagined the exciting digital developments we are now facing and have been faced with in the past two decades. At that time Internet was becoming more mainstream and new online start-ups were developing. Many of them were not successful. However, for example, online retailer Amazon started up by Jeff Bezos is now the most valuable firm in the world and Jeff Bezos belongs to the top 10 richest persons in the world. Many of you probably started to buy their first products online at Amazon. Although, there was an Internet bubble around 2000, since that correction digital firms have only become more important. In the famous Interbrand ranking the top 10 mainly consists of digital companies. This is a striking difference with the Interbrand list of more than a decade ago, where brands like Coca-Cola and Nike, were dominating that list. Digital business models have arisen and they are transforming the society, economy and retailing (e.g. Reinartz et al., 2019; Verhoef & Bijmolt, 2019). With the outbreak of the COVID-19 pandemic digital has only become more prominent. Especially online firms benefit from lock-down- and social distancing measures. Stock prices of online firms have increased substantially. For example, the stock price of Amazon almost doubled since March 2020 when the COVID-19 pandemic started to affect the US.

The strong upcoming of digital has thus also changed retailing. The digital or online channel has become a main search, purchase and service channel in many markets. In some markets like traveling or music, it has become the major channel and firms like Booking.Com and Spotify have become the major players in that industry. The digital channel has also induced to the upcoming of multi-channel (customer) management (Neslin et al., 2006), and recently the focus on omni-channel management (e.g. Verhoef et al., 2015). Historically, firms already used multiple channels, such as stores, catalogs and

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the phone channel. However, frequently firms used one dominant channel especially in the purchase phase. For Walmart and many other retailers the store was the only sales channel. Or firms like LL Bean mainly focused on the catalog as their main sales channel. However, with the upcoming of the online channel and growing online competition firms have taken the opportunity to use the online channel to achieve growth and/or competition forced them to use the online channel as well (Verhoef, 2012). Moreover, online has a role in all stages of the customer journey. As a consequence, multi-channel- and omni-channel management has become very prominent in today's marketing and specifically in retail- and service marketing.

Multi-channel management has been one of my core research area's for two decades now. One of my first published papers considered the adoption of online grocery shopping (Verhoef & Langerak, 2001). This paper studied the online channel only, but since then I have investigated multi-channel management in multiple empirical studies (e.g. Verhoef et al., 2007), and contributed to the conceptual development of multi-channel and omni-channel management with multiple co-authors (e.g. Liu et al., 2019; Neslin et al., 2006; Verhoef, 2012; Verhoef et al., 2015, *in press*). In this invited introduction paper of the special issue on omni-channel management of the *Journal of Strategic Marketing*, it is my aim to discuss some emerging perspectives in omni-channel marketing. Thereby, I will focus on some emerging trends. It is by no means my aim to provide a comprehensive literature review. I will build on my knowledge of the multi- and omni-channel literature and observations on developments in society, technology, and the service- and retailing industry. Before discussing these emerging trends, I will though first briefly reflect on some past developments.

## Past developments

Multi-channel management gained attention in the academic marketing literature around 2005. In 2005 the *Journal of Interactive Marketing* published a special issue with multiple papers on this topic (Rangaswamy & Van Bruggen, 2005). Some of these papers have been rather influential. Kumar and Venkatesan (2005) studied differences in profitability between multi-channel and single channel customers. Van Baal and Dach (2005) already considered free-riding behavior across channels, where customers search in one channel and purchase in another competing channel. Neslin et al. (2006) defined and discussed the concepts of multi-channel customer management, and has been rather influential in shaping the field. In 2015 a special issue of the *Journal of Retailing* appeared, that initially focused on multi-channel retailing, but that during the development of that issue conceptualized and included some studies on omni-channel management (Verhoef et al., 2015). The evolution to omni-channel management was required, as customers as well as firms are using an increasing number of touchpoints to interact with each other in a more seamless way. Liu et al. (2019) summarize the literature developed in this area in the last two decades. They clearly show that there are multiple research streams. Ignoring the frequently studied channel choice behavior, I distinguish four major streams of research:

- (1) Channel usage and switching (incl. multi-channel customer segmentation)
- (2) Channel usage and loyalty outcomes

- (3) Retailing mix across multiple channels
- (4) Firms' multi-channel strategies and its' consequences

The majority of studies have been executed on the first two topics. I will now continue with a brief discussion on each of these four streams of research.

### **Channel usage and switching**

This research stream focuses on research on how customers use channels in the different phases of the customer journey (Lemon & Verhoef, 2016). The main claim in the multi-channel literature is that many customers switch between channels their customer journey. For example, they start searching online and buy offline. Verhoef et al. (2007) investigate this behavior, referring to this as research shopping. They discuss three mechanisms explaining this behavior: 1) channel benefits (i.e. one channel is extremely good for search, while the other is extremely suited for purchase), 2) lack of lock-in within a channel and 3) presence of cross-channel synergies. This type of behavior has been studied in multiple follow-up studies (e.g. Gensler et al., 2012; Polo & Sese, 2016) and some recent studies have focused on specific manifestations of research shopping: showrooming (search offline, buy online) and webrooming (search online, buy online) (e.g. Flavián et al., 2019; Gensler et al., 2017; Kleinlercher et al., 2020).

Not only specific switching between channels have been studied, but researchers have also segmented customers based on their usage of channels in multiple phases of the customer journey. Konoş et al. (2008) distinguished three customer segments: multi-channel enthusiasts, store shoppers and un-enthusiastic multi-channel customers. In a replication De Keyser et al. (2015) confirms the presence of these segments, even when also accounting for after-sales in their study. Recently, Herhausen et al. (2019) have taken a broader perspective including much more channels and touchpoints. They identify different segments, such as an on online focused segment, but still report a store focused segment and a strong multi-touchpoint segment using many channels and touchpoints in a relative long customer journey.

### **Channel usage and loyalty outcomes**

One of the key-interests of existing research within multi-channel is the impact of multi-channel usage on customer purchase behavior and loyalty. Thereby the key-assumption has been that multi-channel should be positively related to metrics, such as customer revenues, purchase frequency and customer profitability. Factors, such as increased convenience and stronger customer lock-in, should explain this relationship. However, one caveat is that also self-selection could play a role, as loyal customers are more likely to use multiple channels. Prior research indeed suggests that multi-channel customers tend to be more loyal and are more profitable (Kumar et al., 2018). However, some recent research suggests that there are differences between customer segments and brands. Lesscher et al. (2020) conclude that the positive relationship between multi-channel and loyalty is not so obvious for very loyal customer segments and premium brands.

Prior research has also mainly considered the impact of multi-channel usage of a firms' own channels in the purchase stage. Not much is known on the impact of

channel usage across firms in the total customer journey. Only recently, Kleinlercher et al. (2020) explored the impact of webrooming (i.e. searching online and buying offline) on customer spending. Their initial analysis suggests a positive relationship between web rooming and revenues. Clearly more research is required to fill this gap in the literature.

## Retailing mix across channels

On a more tactical level researchers have considered how firms should fill in their retailing mix across channels. I hereby refer to Liu et al. (2018) for an extensive overview on the role of pricing, communication, promotions, assortments and service across channels. Specific attention has been paid to the integration of the retailing mix between channels. Should for example, assortments be similar across channels? How should the pricing be across channels? This integration issue is also a more strategic issue. Typically, firms organized themselves around channels, where different managers are responsible for different channels optimizing single channel performance. In an omni-channel environment a more integrated perspective is required in order to create a seamless experience across channels (Verhoef et al., 2015). Research reveals that channel integration, such as sharing information, integrating prices and category assortments, and offering functions not available in other channels (e.g. ship-to-store), increase retailers' sales growth and sales dispersion (e.g. Cao & Li, 2015).

## Multi-channel and firm performance

From a strategic marketing point of view, the impact of multi-channel on firm performance should gain attention. Although there has been ample attention on the impact of multi-channel on customer outcomes, there is limited attention for a firm's multi-channel strategies on firm performance. However, there is been extensive research on the impact of channel additions to the existing channel mix on firm performance. Specifically, researchers have considered how across firms additions of a channel impact stock-market outcomes (e.g. Homburg et al., 2014), while others have considered the impact of adding a sales channel on sales performance (e.g. Avery et al. 2012; Pauwels & Neslin, 2015). In general performance, outcomes seem to be positive, although there could be cannibalization effects. As long as synergy effects and sales growth effects due to a larger market coverage are strong enough, these cannibalization effects will be overcome. If a channel is added having similar capabilities (i.e. online vs. catalog) cannibalization will surely occur (Pauwels & Neslin, 2015).

Researchers have also considered the impact of channel eliminations. These eliminations occur, because channels may become redundant as new channels are taking over their roles and customer behavior is changing. Konus et al. (2014) show that the elimination of a catalog channel increases the profitability due to lower costs, despite the elimination reduces customer revenues. I expect that elimination of channels will become more relevant, given that some channels will become obsolete. This will also go slowly and firms may first reduce the use of channels or change the strategic focus of their stores. For example, banks are constantly closing branches as online banking is

becoming so dominant and banks transform themselves digitally, while their existing banks move from transaction channels to service channels.

## Future Developments

So far, I have mainly discussed past developments and some general findings from prior literature. In this section my aim to reflect on some future developments. I thereby consider the following three important developments:

- Digital only
- COVID-19 Effects
- New Technologies

### Digital only

In the past two decades, we thus have seen an increasing importance of multi-channel. Typically, this concerned a combination of physical channels and online channels. This occurred in almost all retail and service industries. Some retail sectors, such as food retailing, lagged behind, but are now also becoming more multi-channel with market shares for online food retailing of for example, around 8% in the UK. However, in some industries such as travel and banking, online tends to become the major channel. This might also happen in other industries. In these industries where online becomes so dominant, it is likely that especially the physical channel will become obsolete for many customers, and firms will start to eliminate this channel transforming themselves in a fully digital company, where they will service their customers through multiple digital channels. Banks like ING are moving in that direction. As such instead of having a multi-channel proposition, the main channels or touchpoints will be digital where firms interact on different devices (i.e. personal computer, tablet, mobile (apps)) using video, voice and chat technologies. This would imply that we would move from multi-channel usage more to multiple digital device usage. Prior research has shown that devices may take a different role in the purchase process, where specifically mobile devices are important for search and fixed devices (i.e. personal computer) are more important for purchase (De Haan et al., 2018) and thus are used later in the purchase funnel. Research has also shown that when customers adopt an app for purchasing products or services, they become more loyal (e.g. Liu et al., 2019; Van Heerde et al., 2019).

Digital seems a viable strategy in multiple industries. However, there are some considerations requiring more research in this domain. The question is to what extent all customers are able and willing to move to digital channels. Existing studies still suggest that there is a sizeable physical channel focused segment (e.g. Herhausen et al., 2019). Customers may feel forced to move digital which can create dissatisfaction (Trampe et al., 2014). We will probably also observe firms that still will serve customer segments through physical channels. These firms may even use this as a way to position themselves in the market having a distinctive position. One concern for these firms is though if this is a viable strategy given potential cost advantages of digital only firms, that have reduced real estate costs as well as have lower personal service costs. An

important question will be whether customers are willing to pay a price premium for more personal face-to-face service, and in which circumstances they are willing to do so.

### **Covid-19 effects**

The COVID-19 pandemic has severe effects on global societies and economies. One of the major sectors affected is the retail sector. Especially physical retail has been affected. The pandemic induced governments to take measures to reduce the spread of the corona virus. Social distancing measures induced that consumers are more reluctant to go shopping, while specific consumer groups (i.e. elderly people) are feared to go out anyhow. Furthermore, lock-down measures of the government have forced physical non-essential retailing to close for periods of time. These COVID-19 measures have increased online shopping. While physical retail suffered, online retailing flourished in 2020. This external COVID-19 shock will probably also have a strong future effect on (multi-channel) retailing. One important question is to what extent the shock will have enduring effects on shopping behavior. Temporarily consumers have moved to the online channel. Will these consumers return to purchase from stores when the pandemic has stopped? Or will they keep spending a large part of their budget online? It is likely to expect that especially store focused consumers now have moved online given that these consumers are typically also older and more vulnerable for the pandemic. Will these store focused consumers now become multi-channel consumers? The increase in online retailing will also make online retailers, such as Amazon, even stronger. Their market power is likely to increase, which can have strong effects on retailing markets. Furthermore, physical retailers who already faced difficulties due to the upcoming of online retailing, will become even weaker and may face stronger financial problems. Governments are supporting business hurt by COVID-19, but the question is whether that will be sufficient and whether we will see an increase in bankruptcy's of physical retailers. If the latter occurs the retailing landscape is structurally affected, and we will see shops closing and which will also result in less attractive city and/or shopping centers. As a consequence, online retailing with enormous variety in assortments, will only become more attractive. I here now only write down a potential scenario, which implies a structural effect of the COVID-19 pandemic on retailing, and specifically a stronger position for online retail and a weaker position for physical retailing. Future research should aim to answer these strategic questions. This calls for scenario-analysis and a deeper investigation of the financial performance of online and physical retailing. Moreover, as these changes also affect city-centers, it also has far reaching impact on society emphasizing the societal relevance of this research.

### **New technologies**

Within omni-channeling retailing linking online and in-store shopping experiences is important. Currently there are growing technological opportunities to connect the online with the offline creating unique customer experiences. Artificial intelligence (AI) can, for example, automate and customize the retail experience. Verhoef et al. ([in press](#)) discuss how new technologies will have an effect on the customer journey. New technologies will

affect the search phase. As already noted new mobile technologies are affecting search behavior, as consumers are also using mobile in-store (Rapp et al., 2015), while retailers may also offer apps to help store shoppers. Augmented and virtual reality allow for virtually trying (on) products like clothes immersing customers into the product usage experience (Holzwarth et al., 2006; Inman & Nikolova, 2017). New technologies also help to provide customized offers when shopping especially using mobile technologies. In the purchase phase mobile is becoming more important, and especially apps become more dominant with already noted positive effects for retailers (e.g. Liu et al., 2018). Payment will be automated further, and mobile payment through for example, Apple Wallet, will become more prominent. The latter will affect both physical and online retailing, but might for example, further reduce the perceived risk of online payment. It is likely to also see more advance combinations between physical and online in terms of delivery of products. Click and Collect is now rather well accepted in food retailing as it solves the last mile problem (Gielens et al., 2021). Consumers order food products online and pick the purchased items in the store. Gielens et al. (2021) investigate the effects of different Click and Collect forms, and show that the effects on purchase behavior differ between these forms and differ between customer segments. As COVID-19 has moved consumers to shop for grocery products online, it is likely that especially in grocery retailing Click and Collect will become more important. Furthermore, logistically both logistic firms (i.e. DHL) as well as own-delivery services are not likely to have sufficient capacity especially during peak-moments (i.e. Christmas), while inner-cities are flooded with vans delivering parcels. This further calls for smart logistic solutions, where online and offline could work together.

The upcoming and further development of new technologies provide vast opportunities for further research in omni-channel retailing. This may start with questions surrounding the acceptance and usage of these new technologies, as well as the consequences for the customer experiences and purchase behavior (Verhoef, 2020). Furthermore, strategically it may be important to study how firms can use these new technologies in their omni-channel strategy, as well as how it may provide them with a competitive advantage. The technological delivery solutions calls for inter-disciplinary research between marketing and operations management.

## Summary and concluding thoughts

In this invited paper, I have provided reflections on multi-channel and omni-channel retailing. This has become a dominant development in retailing in the past two decades. This is likely to stay. We have seen extensive research on this topic, and I very briefly discussed four major area's of research. However, as noted I strongly refer to prior more extensive research overviews (e.g. Liu et al., 2018; Verhoef et al., [in press](#)).

Beyond that, I have discussed three major developments, which I believe are important developments. I admit that these distinguished developments are potentially rather subjectively chosen, and based on my experience in this field. Especially, the move to more digital which is likely to be strengthened further by the COVID-19 pandemic is a very interesting and relevant development. If this occurs, omni-channel will gradually get a different meaning. The importance of connecting the online- and offline world will become less relevant, while purchase behavior will become more digital where new technologies can create a kind of offline experience.



Anyhow, omni-channel retailing will remain very relevant and an important topic to study in marketing and retailing. I hope that this paper will provide new ideas for future research and will inspire studies on this topic.

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