
Guest editorial: The phygital research paradigm: philosophical foundations for examining consumer experiences and behaviors in hybrid physical-digital realms

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1. Introduction

The digital revolution has given rise to hybrid environments, commonly referred to as “phygital” spaces. These spaces seamlessly blend physical and digital elements, thereby creating unique consumer experiences and leading to paradoxical behaviors. While existing academic works approach phygital from a channel perspective (Akter *et al.*, 2021), mainly related to technology, platforms, and device integration, Batat (2022a) defines phygital as a human-centric holistic ecosystem that blends physical, human, digital and various other elements from a consumer perspective. Its aim is to ensure a seamless delivery of value from digital to physical realms, and vice versa. Therefore, understanding phygital as a research field where consumption activities and market transactions occur is crucial for scholars. Such an understanding facilitates the examination of methodological and epistemological approaches researchers can use when studying phenomena within phygital settings. Indeed, the complexity and nuances of consumer behaviors and experiences within phygital spaces necessitate a distinct research paradigm.

This editorial article aligns with the experiential-phygital research literature (Batat, 2022a) and proposes a novel framework, the “phygital research paradigm,” for studying consumer behaviors, consumption experiences and other phenomena in blended physical-digital environments. This paradigm enables researchers to capture changes in consumer behaviors and social actors’ interactions as they transition between contexts. Besides, the phygital research paradigm responds to Dahlstrom *et al.* (2008) call for a diversified research design approach in marketing. The authors contend that the current literature lacks both triangulation and diversity in its methodologies. This deficiency, they argue, impedes the generation of new knowledge that could further enrich both marketing theory and practice. Hence, the phygital research paradigm, which is anchored in four key philosophical foundations – liquid ontology, dual axiology, interpretivist epistemology and multimethodology – offers researchers a comprehensive and flexible framework for exploring phenomena occurring in hybrid contexts. These contexts blend the characteristics of physical and digital settings and are characterized by iterative transitions from one setting to another, and vice versa.

Consequently, this paradigm provides researchers with adaptability, facilitating the combination of diverse techniques and methodological protocols as they transition the research field from one domain to another. This adaptability empowers them to discern subtle patterns associated with the continuity or discontinuity between physical and digital study settings. This, in turn, guides the clarification of the field approach and the identification of new phenomena, ultimately leading to the generation of insights and the advancement of theory in marketing.



The following sections introduce the phygital research paradigm and explore its philosophical foundations, with illustrations from articles published in the special issue, “The Future of Interpretivist Research Methodology is Phygital,” of the journal of *Qualitative Market Research*. The aim is to provide a comprehensive guide for studying phenomena in phygital or other hybrid settings, enhancing knowledge creation alongside theory building. The article concludes with an overview of future research directions.

2. Defining the phygital research paradigm

The phygital research paradigm is a novel approach to studying consumer behaviors in hybrid environments, where consumption and shopping experiences may transition between physical and digital settings. This paradigm is critical for capturing changes in consumer behaviors and social actors’ interactions as they switch contexts, offering insights into how each setting influences data collection, analysis and interpretation. This paradigm provides researchers with a versatile and reliable protocol, accommodating various methodological processes tailored to such hybrid contexts.

The adoption of this paradigm necessitates a recalibration of the investigative lens of researchers, encompassing their philosophical stance, perception of reality, posture and methodologies. This approach addresses a critical gap in marketing research by promoting methodological diversity and enhancing triangulation efforts. The phygital research paradigm provides a coherent blueprint for research design, which serves as a comprehensive guide for studying phenomena within phygital or other hybrid settings. It anchors its logic in the four conventional philosophical fundamentals:

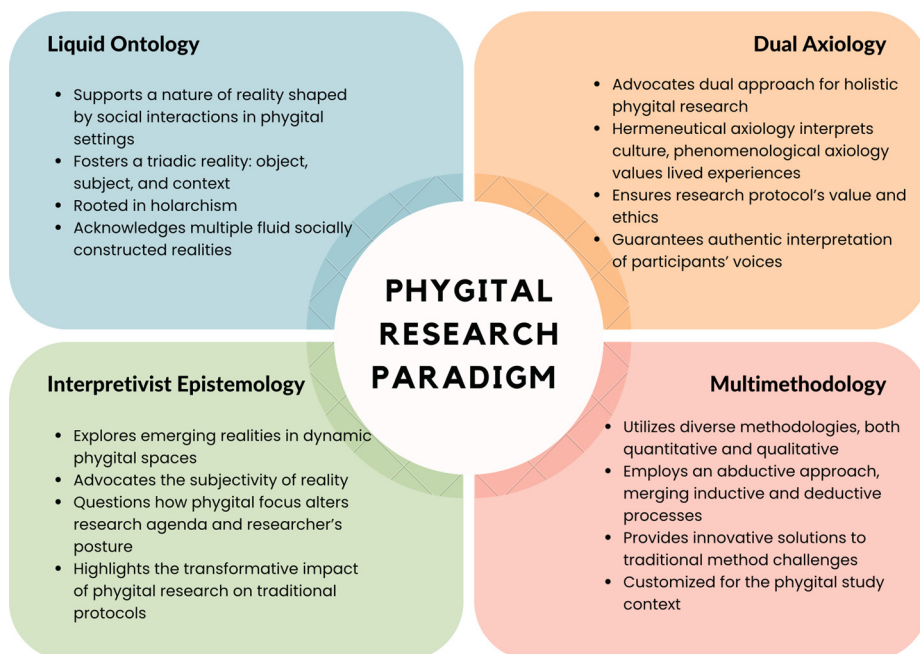
- (1) ontology;
- (2) axiology;
- (3) epistemology; and
- (4) methodology.

These are at the core of every research framework in many disciplinary fields, including marketing and consumer studies, but in the phygital research paradigm, they are customized within the blended physical-digital context.

Consequently, the adapted philosophical underpinnings, specific to the phygital research paradigm, facilitate robust investigations across both tangible and virtual landscapes. This novel approach enriches research outcomes and promotes theoretical advancements.

3. Philosophical foundations of the phygital research paradigm

In the phygital realm, consumption and shopping experiences may commence in a physical setting, such as in-store, and continue in the digital space like an e-commerce website – or vice versa. Thus, the phygital research paradigm helps researchers understand how each context influences data collection, analysis and results, providing insights into the evolution of the studied phenomenon. The phygital research paradigm involves four key philosophical foundations (Figure 1), which are adapted for studies conducted within fused physical-digital fieldworks. Researchers can rely on these foundations to investigate consumer behaviors, consumption experiences and other phenomena where reality is shaped by a dual context. The following sections delve into the philosophical grounding of the paradigm and its four foundations emphasized by the works published in the special issue on the topic of phygital research frameworks in the *Journal of Qualitative Market Research*.



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Figure 1.
The phygital research
paradigm

3.1 *Liquid ontology: a holarchic approach in the phygital research paradigm*

Ontology, in the context of research, delves into the “nature of reality,” aiding researchers in discerning the existence of facts, whether they are independent or subjective, static or evolving. The ontological perspective informs the scientific frameworks for knowledge creation and shapes the perception of phenomena. Three primary ontological positions are recognized within scholarly discourse (Snape and Spencer, 2003):

- (1) realism, which posits that reality exists independently from social constructs;
- (2) materialism, which acknowledges only tangible aspects as real; and
- (3) idealism, which views reality as a product of human consciousness.

The phygital research paradigm advocates for a subjective interpretation of reality, influenced by the perceptions of social actors, a collective construct shaped through interactions among multiple entities across different settings. This perspective leads to the proposal of “liquid ontology,” a concept that encourages researchers to adopt a flexible stance in dynamic settings where iterative shifts between physical and digital fieldworks occur. Liquid ontology challenges traditional one-dimensional perspectives on reality, which are typically either object-centric or subject-centric. Instead, it promotes a triadic understanding that encompasses the object, the subject and the context. This holistic view captures the fluid dynamics of reality and the inherent truth of social systems.

Building upon Koestler's (1967) concept of holarchy, which describes self-regulating hierarchies called holons, liquid ontology is thus rooted in holarchism. This fourth

philosophical stance, which researchers can adopt while implementing the phygital research paradigm, allows for the examination of the nature of reality and phenomena occurring in fluid and interactive environments that merge digital and physical settings. Holarchism expands upon realism, materialism and idealism by integrating holism's interconnectedness with hierarchical structures across various contexts – social, organizational or natural – to dynamically form reality.

For instance, [Levy and Sabri \(2024\)](#) article serves as an example of applying the phygital research paradigm. The article examines brand communities within both physical and digital domains, using liquid ontology principles. This approach underscores the multidimensional nature of defining brand communities in a phygital context. The authors introduce the concept of “Phygital Brand Community” (PBC) and explore potential conflicts that may emerge from simultaneous engagement in multiple PBC realities. To address these potential conflicts, they propose an enhanced netnographic methodology to investigate the influence of overlapping PBC engagements on the phygital experience. The authors underline the limits of traditional netnographic methods when applied in the phygital and subsequently develop a refined research protocol that addresses these challenges. This protocol incorporates two innovative analytical methods: “participatory netnography” and “witness netnography.” These methods stem from a hybrid approach that combines elements of traditional netnography, thereby enabling researchers to capture the fluid and evolving nature of phenomena studied within the phygital.

Similarly, [Mele et al. \(2024\)](#) study explores the complexities and dynamics of the “phygital customer journey” (PCJ), a concept that merges physical and digital interactions within customer experiences. Their research uses a practice-based approach to delineate the multifaceted nature of PCJs. They identify four central elements of PCJs:

- (1) hybrid artifacts (combinations of digital and physical tools/interfaces);
- (2) blended contexts (the seamless integration of digital and physical spaces);
- (3) circular actions (nonlinear customer engagement paths); and
- (4) intertwined emotions (complex emotional responses to phygital experiences).

The study emphasizes the dynamic and symbiotic interplay among these four elements that form phygital customer journeys. Each element influences and is influenced by the others, underscoring the liquid ontological nature of the PCJ concept.

Positioned within this philosophy, a holarchic approach to liquid ontology aligns with the notion that multiple socially constructed realities exist. This alignment underscores the core idea of a liquid nature of reality in the phygital research paradigm.

3.2 Dual axiology in the phygital research paradigm

Axiology, the philosophical study of value, is pivotal in research as it steers the ethical considerations researchers must address when designing their study frameworks. This involves comprehending the implications of one's actions within the research context and establishing the value that underpins both protocol and implementation. Although axiology has diverse philosophical origins, its application in marketing and consumer research is contingent on the researcher's chosen perspective – positivist, interpretivist, constructivist or critical. In phygital research, axiology is indispensable for evaluating phenomena, extracting core values from studies, and aligning these with empirical contexts, thereby guiding ethical practices and result interpretation.

In the phygital research paradigm, where interpretivism is central, researchers should employ hermeneutical alongside phenomenological approaches to deepen their

understanding of phenomena. Hermeneutical axiology (Sica, 2015), focusing on cultural interpretations, discerns value from social behaviors or consumption patterns, while phenomenological axiology (De Monticelli, 2021), captures value through lived experiences within specific contexts. To gain comprehensive insight into knowledge dimensions within the phygital paradigm, a dual approach integrating these two perspectives is advocated. Hermeneutics probes the meanings behind actions to inform collective ethical judgments, while phenomenology describes actors' experiences interacting with their environment to unveil phenomenon structures. In phygital contexts, where experiences encompass both physical presence and virtual consciousness (Batat, 2022b), this dual approach facilitates a nuanced exploration of emergent values based on lived experience.

For instance, Cavusoglu and Belk (2024) study on sensitive topics in both physical and digital environments highlights the importance of a dual axiology approach integrating hermeneutics and phenomenology. Hermeneutics is employed to interpret narratives and experiences shared by participants during in-depth interviews and ethnographic studies, aiming to understand the participants' experiences and emotions. Similarly, phenomenology, emphasizing the subjective experiences and perspectives of participants, is applied through the active participation of individuals, especially those with facial differences. These individuals participate as co-researchers, content creators, curators and collaborators, ensuring the research authentically represents their experiences and perspectives. By adopting a dual axiology approach, the authors underscore the significance of the phygital research paradigm when considering innovative methodological approaches such as "collaborative videography," thereby ensuring the value and ethics of their research protocol. This guarantees that the participants' voices are authentically represented and interpreted from their unique personal perspectives.

3.3 Interpretivist epistemology in the phygital research paradigm

Historically, marketing and consumer behavior research has been dominated by a positivistic perspective, which posits that reality exists objectively, independent of the researcher. However, the rise of interdisciplinarity in marketing research and the emergence of consumer culture studies (e.g. Arnould and Thompson, 2005) have led to the development of diverse epistemological stances, including interpretivism. Interpretivism, viewing reality as a social construct shaped by actions and interactions, has gained popularity among consumer researchers studying complex phenomena. This approach is particularly suited for research within the phygital paradigm, examining consumer behaviors and experiences in both blended environments. Unlike positivism, valuing objectivity, interpretivism promotes the idea that reality is subjective and socially constructed (Beckmann and Elliott, 2000).

The phygital research paradigm raises questions about how focusing on phygital as a new field of research modifies the research agenda, the researcher's posture and the methodological protocol. It also questions how interpretivism can be implemented in the phygital context to examine brands' marketing strategies connecting online and offline settings. Preliminary answers suggest that interpretivism approaches consumers from a personal perspective, where their behaviors are embedded and shaped by the context, in this case, phygital. Despite its growing popularity among marketing scholars (e.g. Tadajewski, 2006; Shankar and Goulding, 2001), interpretivist approaches remain underused for studying evolving consumer behaviors within phygital contexts. Therefore, the phygital research paradigm grounded in an interpretivist epistemology enables researchers to explore how realities emerge within hybrid contexts dynamically transitioning between physical and digital spaces.

For instance, in luxury research, [Parnwell and Meng \(2023\)](#) critique positivist perspectives, underscoring interpretivism's potential for a nuanced understanding of luxury consumption across physical and digital environments while cautioning against its inherent biases. The authors propose integrating multiple interpretivist perspectives to mitigate these issues. Parallel to this logic, [Yao et al. \(2024\)](#) study emphasizes the power of an interpretivist framework to unravel the intricacies of consumer behavior within phygital spaces. This approach yields meaningful insights into consumer decision-making and preferences by embracing the principles of interpretivist epistemology at the heart of the phygital research paradigm.

3.4 Multimethodology in the phygital research paradigm

The phygital paradigm, rooted in interpretivist epistemology, offers a unique framework for multimethod research. This approach guides researchers investigating diverse issues across physical and digital environments. Unlike traditional marketing and consumer research studies, which are based on positivist epistemology and typically adopt either deductive (research starts with a theory and hypotheses, which are then validated or rejected through empirical investigation) or inductive (grounded in field exploration for theory development and conceptualization) methodologies, phygital research requires a distinct approach. The research paradigm, given its hybrid blended setting and evolving fieldwork, relies on an abductive approach ([Hurley et al., 2021](#)). This approach combines both inductive and deductive processes, involving a dynamic interplay between theory and data.

In the phygital research paradigm, researchers can use abductive reasoning to investigate phenomena in both physical and digital settings. This involves implementing a multimethodology research process that leverages various complementary methodologies. These include quantitative methods, such as statistical modeling and big data analysis, and qualitative methods tailored to the study context, such as observation and online interviews. For example, [Johnson and Barlow \(2023\)](#) suggest neurophenomenology as a novel methodology in phygital marketing research. This approach interprets first-person accounts of phygital experiences, providing a fresh perspective on the research design. It paves the way for empirically testing the impact of phygital interventions through neuroscience, highlighting the need for a multimethod approach ([Cavusoglu and Belk, 2024](#)). On the other hand, [Schöps and Jaufenthaler \(2024\)](#) propose Semantic Network Analysis (SemNA) as a solution to investigate phygital environments.

Likewise, [Yu et al. \(2023\)](#) recommend a mix of qualitative methods like ethnography, case studies, in-depth personal interviews, experimental research designs to test the effects of phygital experiences on consumer happiness alongside longitudinal survey methods to examine the enduring effects of phygital experiences on consumer happiness, and the use of various technologies in measuring phygital consumer experiences. [Schmitt \(2023\)](#), however, emphasizes the need to transform current methodologies in marketing, particularly with the rise of artificial intelligence (AI). Schmitt argues that generative AI can offer a more objective and innovative solution to the challenges of traditional methods by assisting in data collection, cleaning, and analysis in the phygital setting. However, the author also acknowledges issues and concerns about the use of generative AI, including hallucinations, ethical issues about data ownership, data sharing and authorship, selection bias and the broader “black box” problem.

4. Future research directions in the phygital research paradigm

The phygital research paradigm provides novel insights into consumer behaviors and experiences in hybrid physical-digital environments. This paradigm opens up several promising avenues for future research. One such direction could involve applying liquid

ontology to various contexts to understand how the dynamic nature of social systems influences consumer behavior in phygital spaces. For example, investigating how retail experiences evolve across physical and digital platforms may shed light on these platforms' role in shaping consumer engagement.

Additionally, there is significant potential for a deeper examination of dual axiology that combines hermeneutics with phenomenology. Researchers might explore how cultural interpretations and personal experiences contribute to value creation within phygital settings. An inquiry into ethical considerations during research planning and execution in these environments could yield valuable insights. Further exploration could also enhance interpretivist epistemology within this paradigm by studying the formation and evolution of reality in phygital contexts and its effect on phenomena interpretation. Moreover, adopting multimethodological approaches that use both quantitative and qualitative methods could offer a comprehensive understanding of phygital phenomena. Using techniques such as phygital ethnography (Batat, 2022a) or experiential research methods (Batat, 2023) could deepen our knowledge of consumer behaviors and experiences in these hybrid spaces. Finally, it is crucial to address the challenges posed by the subjectivity and conceptual fluidity inherent in the phygital research paradigm. Identifying strategies to overcome these issues will be essential for advancing methodological rigor.

In summary, this editorial piece alongside the special issue on the topic of phygital research paradigm holds great promise for exploring the complexities of blended physical-digital settings. Through continuous investigation and refinement, researchers can enhance their comprehension of consumer behaviors and experiences, improve their research methodologies, contribute to theoretical development and thereby enrich marketing theory and practice with valuable insights.

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Further reading

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Journal of Marketing Management, Journal of Macromarketing, Journal of Services Marketing, Journal of Retailing and Consumer Services, Journal of Consumer Marketing, Journal of Service Management, International Journal of Tourism Research, Employee Relations, Hospitality & Society, International Journal for Consumer Studies, Qualitative Marketing Journal, Young Consumers, Journal of Research for Consumers, Advances in Consumer Research, among others.