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Predicting Trends and Building Strategies for Consumer Engagement in Retail Environments

Giuseppe Granata, Andrea Moretta Tartaglione, and Theodosios Tsiakis

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A volume in the Advances in Marketing, Customer Relationship Management, and E-Services (AMCRMES) Book Series

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Customer engagement is one of the most debated topics in marketing literature. The great interest of the scientific community resulted in a large amount of research on this topic making it difficult for scholars to understand how to really contribute to advance the research. Based on these considerations, this chapter aims to provide an overview of the research findings and trends of previous studies to guide the researcher to the most influential works, results, and issues that need more insights. In particular, this chapter offers a literature review on customer engagement and retail customer engagement using bibliometric analysis and scientific mapping study. Results show the most productive authors, most cited publications, most frequent words, and clusters of related words. The analysis provides a description of the state of the art of retail customer engagement and suggests future research directions.

Chapter 2
Amin Saleh, Louisiana Tech University, USA
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Academics have embraced "engagement" and produced thousands of articles related to the topic. Despite the attention though, the literature remains confusing as to exactly what "engagement" is and what "engagement" is not. A brief history of evolution of academic perspectives on engagement, including both conceptual and empirical works, is provided to demonstrate the ambiguous nature of this topic. This chapter attempts to shed some light on delineating engagement through illustrations drawn from retailer activities that represent attempts to engage consumers. Specifically, the chapter focuses on Walmart's and Amazon's engagement tactics. The activities are classified using a theoretical taxonomy. In the end, the chapter intends to aid future engagement in engagement research.

Chapter 3

Natalia Rubio, Autonoma University Madrid, Spain
Nieves Villaseñor, Autonoma University Madrid, Spain
Maria Jesús Yagüe, Autonoma University Madrid, Spain

The chapter analyzes the components that generate users' engagement in a third-party-managed virtual community and these components' contribution to building user identification with the community. When this chapter distinguish between users who share their comments in multiple service categories to users who share comments in only one or two service categories, it is found that enjoyment benefits and participation in co-innovation increase identification with the community for both groups. The two groups differ, however, in that learning benefits improve identification with the community for participants who share comments on three or more services but not for participants who share comments on fewer services. The latter group's identification is, however, influenced by social benefits, functional benefits, and advocacy, feedback, and help to others.

Chapter 4

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Alex Douglas, The Management University of Africa, Kenya

The financial crisis of 2008 produced various effects on banks compelled to rethink their business models, especially for better customer relationship management following the general climate of distrust among consumers towards financial institutions. In this context, understanding how to both satisfy and engage customers has become very important. The aim of this chapter is to investigate the role of service innovation in customer engagement in the banking sector. This chapter analyzes the effects of innovative services on customer satisfaction through the study of an Italian people's bank and the application of the Kano model. The results allow identifying those services that should be improved, as they are able to increase customer satisfaction and stimulate customer engagement. For practitioners, this chapter provides evidences on how new technologies allow banks to offer high quality and personalized services through which it is possible to improve the experience of customers and their relationship with the bank.

Chapter 5

David Marutschke, Soka University, Japan
Ted Gournelos, Rollins College, USA
Subhasis Ray, Xavier Institute of Management, India

Customer experience management is a relatively new research field. Although past literature has studied certain aspects and elements of customer experience, major questions are still unanswered, including how to integrate touch-points across the customer journey and how to measure customer experience in a way that takes its multidimensional nature into consideration. This chapter attempts to provide a framework to study how customers perceive touch-points as a holistic experience and proposes an

integrated approach to measuring the experience of challenges that result in what we call "friction." The framework is based on the concept of "fluency" from the engineering and omni-channel literature and suggests survey items which can be used for future empirical studies. Insights from this research can be used by various types of organizations to better identify problems in the customer experience in regard to the process and dynamics of touch-points through time and across channels/platforms, thereby enhancing value for customers and businesses.

This chapter aims to identify customers' needs in regard to in-store shopping experiences and to examine these results with specific reference to generational differences between the senior and younger customers. This exploratory study followed a qualitative approach based on semi-structured interviews conducted through focus groups. Specifically, four sessions were organized with 24 Italian customers, of whom 12 were baby boomers and 12 were millennials, who were frequent visitors to retail stores to undertake shopping activities. The pleasure, arousal, and dominance (PAD) model was used to explain customers' needs in regard to in-store shopping experiences. The research contributes to the current literature on both a theoretical and managerial level. From a theoretical perspective, it identifies customers' needs in regard to in-store shopping experiences with particular attention devoted to the generational perspective. In managerial terms, this study provides retailers with suggestions on possible strategic paths to be taken to create a personalized in-store shopping experience.

The aim of this chapter is to analyze the most relevant factors affecting retailers by investigating the relationships between store type, assortment level, customers' purchases, and sales productivity. Analyzing the dataset of the German retailer Rossmann through classification and regression tools, this work investigates what store type customers visit more often, what kind of assortment they prefer, and how sales profitability is affected by internal and external factors. Results show a tendency from customers to shop in smaller neighborhood markets rather than in the large shopping centers with extensive assortments, determining an increase in sales productivity in smaller size stores. Results suggest managers developing strategies for creating multiple retail formats in order to meet the diverse customers' tendencies in the today's market.

Literature on product categorization of e-retail products has adopted a consumer view and studied the direct effect on consumer-level variables such as purchase intent or customer satisfaction. In doing so, the moderating effect of product categorization of e-retail products on firm-level variables has been ignored.

To address the implications of e-retail product categorization, this chapter asks the following question, What is the moderating effect of e-retail product category on sales performance? This chapter uses concepts of information economics, e-retailing, and the search-experience-credence (SEC) categorization of products to develop theoretical hypotheses. Using data from 500 US e-retailers, this chapter contends that the ease to evaluate retail products online has a positive effect on sales volume of e-retail firms. This effect is the result of increased web traffic and decreased conversion rates, which describes the e-retail market behavior with firm-level variables.

Chapter 9

Fabio Cassia, University of Verona, Italy
Francesca Magno, University of Bergamo, Italy

Despite the rapidly increasing popularity of social media influencers and of influencer marketing, academic and managerial knowledge on this phenomenon is still limited. The purpose of this chapter is to examine to what extent cultural and tourism social media influencers are able to influence their followers' consumption decisions. In particular, the chapter provides new evidence based on data collected among 341 followers of hospitality and tourism bloggers and 208 followers of cultural bloggers in Italy. By comparing the results from the two subsamples, conclusions about the effectiveness of bloggers in the two contexts are drawn. Based on the findings, some avenues for future research and some practical guidelines for social media influencers are suggested.

Chapter 10

Mercedes Marzo-Navarro, University of Zaragoza, Spain
Carmen Berne-Manero, University of Zaragoza, Spain
María Gómez-Campillo, University of Zaragoza, Spain
Marta Pedraja-Iglesias, University of Zaragoza, Spain

Recent tourism literature reviews the movement of the current distribution landscape toward disintermediation as the Internet and mobile technologies provide consumers with more and more tools for researching suppliers/providers and purchasing products and services directly. This calls into question the necessity and role of retailers in the industry. Focusing on online travel agencies (OTAs), this chapter is aimed at solving three main research questions: What is the current position of online tourism retailers as indirect channels in the online tourism distribution system? What are the strengths of OTAs as seen by their customers? and How should OTAs face the future? A database drawn from a survey of Spanish digital tourists is used to illustrate the initial theoretical discussion and concluding remarks.

Chapter 11

Myriam Quinones, Universidad Autónoma de Madrid, Spain
Mónica Gómez-Suárez, Universidad Autónoma de Madrid, Spain
Maria Jesús Yagüe, Universidad Autónoma de Madrid, Spain

The purpose of this chapter is to critically review current studies on "smart shopping" with the aim of improving the understanding of this phenomenon and suggesting future lines of research. The authors present a pioneering classification of international research on smart shopping published in the last 30

years that provides a comprehensive overview of existing knowledge. They categorize smart shoppers' traits and develop a thorough analysis of existing measurement scales, data collection methods, product categories and countries that have been objects of prior studies. Their findings highlight the need to develop cross-cultural models that consider the affective and behavioral dimensions of smart shoppers from different countries to help academics and practitioners better identify and target this customer segment.

Chapter 12

Maria Vincenza Ciasullo, University of Salerno, Italy
Paola Castellani, University of Verona, Italy
Silvia Cosimato, University of Salerno, Italy
Chiara Rossato, University of Verona, Italy

Digital revolution has involved and changed many service industries and also retailing, renewing its inbound and outbound processes. The pervasiveness of the internet of things has boosted the rise and growth of digital platforms, exploiting consumers' potential in personalizing their shopping experience, according to their wants and needs. Digital platforms have triggered the transition from a traditional two-sided marketplace towards a dynamic and complex one. The smart mindset, which has pervaded retail service domain, is in line with the current service research, according to which the dematerialization of value exchanges implies a new approach to the traditional service delivery. Therefore, this chapter aims at investigating the way retailers manage digital tools. Embracing the framework of S-D logic, the analysis shapes the role that the digital technologies have in digital process reconfiguration as well as in the shaping of specific context or platform able to boost the emergence of retail service innovation. A multiple case study has been performed.

Chapter 13

Xhimi Hysa, EPOKA University, Albania
Vusal Gambarov, EPOKA University, Albania
Besjon Zenelaj, EPOKA University, Albania

On-campus retailing is a spread practice, but academia has almost underestimated its potential. Nevertheless, not every type of retail activity adds value to customers and society. When the proposed value is society-driven and sensitive to consumers' wellbeing, customers' engagement increases. One business model, through which it is possible to exploit the benefits of on-campus retailing by adding social value, is the Yunus Social Business. This is a case-based study aiming to describe, through the Social Business Model Canvas, the founding of an organic shop within a university that is supplied by administrative staff of the university that are at the same time also local farmers. Further, the shop aims to resell organic food to university staff and students. The case study is theoretically enriched by traditional Porterian frameworks and new service frameworks such as the service-dominant logic by emphasizing the role of value proposition, value co-creation, and value-in-context.

This chapter uses a theoretical background to identify and explain a new proximity concept in retail sector. In particular, adopting a marketing and management approach, an innovative type of "proximity" is presented, explaining a set of numerous elements and relationships that could link retailer, customer, and territory: "the relational proximity." The factors useful to describe the roots of "relational proximity" between retailer and customer are presented and identified in a specific case study. The new concept of relational proximity represents the originality of this study. It explains the mood coming out from the integration between the retail value offering and its contextualization with environment, society, and contemporaneity. Following this logic, the retailers in the future will focus their competitive advantage working with the customers, building day by day their relational proximity.

The adolescent is considered as an active element in family purchase decisions, especially in the earliest stages of the process. However, researchers have focused their attention on purchases for adolescent use. In this chapter, the author examines adolescent influence for several products. A survey was used to collect data from several high-schools in districts of Lisbon, Setúbal, Portimão, and Beja. 2,800 questionnaires were delivered during May 2016. Adolescents were instructed to submit the questionnaires to their mothers and to return them, fully completed. 966 validated questionnaires were returned. The results point to adolescent's age, gender, product knowledge, and mother's occupational status as the relevant explanatory variables. The results also point to the relevance of considering product category as a moderating variable. The present chapter offers a contribution to companies by providing evidence of adolescent's influence in family purchase decisions. It is important that producing companies and retailer marketers focus their efforts on adolescent satisfaction.

Preface

The deep recession might explain the crush of big retailers, still, in decay after great recession retailers face the meltdown. In post-recession period, they have the real situation: overall retail spending steadily, if a little barely. The possible low-economy level of countries might not affect this situation; in fact, many of them face recovery in economic terms as growth of wages and GDP, reduced unemployment and fuel gas, so the trend of steady shopping might be influenced by other factors: the increase of online shopping, the change of consumer aspirations and habits, the overwhelmed assortments in shopping malls, the revival of restaurants experience.

In today's digitalized and hyper connected environment, customers are at least expecting retailers to realize and achieve their needs "on" time. Retail is heavily impacted by the digital revolution and specifically digital technology, which is the enabler that drives winning engagement for all. Customer experience doesn't constraint in creating a satisfactory experience during their sales journey but creating customer loyalty. Consumers' purchase experience patterns are complex and customers definitely want quality, service, offers and convenience in their transaction with retailers. The consumer becomes so often "seeker for discounts", "bargain-hunters", and "fan of fast-fashion outlets". This dynamic nature of consumer behavior and evolving technology has created unforeseen circumstances and opportunities for retailers! The key question is: are retailers ready to capitalize disruptive technologies and innovative methods and gain a consumer's attention?

Confronting these phenomena there is a need in a research world to explore what is the today's consumer profile, what are occurring inside and outside of retail environment, and accordingly set the frameworks for future recovery strategies. The purpose of the book is to explore the external and internal influence on consumer shopping in a retail store, considering the multi-disciplinary approach, with the objective to help retailers to overcome current situation, to find and better predict trends, rebuilt and implement strategies in various retail segments.

The book analyzes customer engagement, a very interesting topic and currently discussed among scholars. By analyzing the contributions in this research area, it emerges that the focus is on the analysis of the attitudinal and behavioral dimensions of customer engagement, its antecedents and consequences, and its evolution on social media

The subject area covers multiple disciplines related to retail business as a retail management, relational marketing, digital marketing, consumer behaviour and marketing management. It is necessary to link the various disciplines in order to explore the factors that influence the consumer behaviour inside and outside of a retail store. Under the retail context can be considered any retail format with its micro-environment offering products and service in which also the other provider of services (e.g. touristic

accommodations) can be included. By meaning of an environment, it can be any environment that a retail format interacts with or is influenced by, e.g. macroeconomic environment, international markets, micro-environment, web-environment, also impact of weather, technology, demographics structure etc.

ORGANIZATION OF THE BOOK

The current book is organized in 15 chapters. The first seven chapters are focused on customer engagement phenomenon. Thus:

- Chapter 1, "Retail Customer Engagement: A Systematic Mapping Study," offers a literature review on customer engagement and retail customer engagement, using bibliometric analysis and scientific mapping study. Results show the most productive authors, most cited publications, most frequent words and clusters of related words.
- Chapter 2, "An Action-Based Approach to Retail Brand Engagement," provides a brief history of evolution of academic perspectives on engagement, including both conceptual and empirical works. Also this chapter sheds some light on delineating engagement through illustrations drawn from retailer activities that represent attempts to engage consumers. Specifically, the chapter focuses on Walmart's and Amazon's engagement tactics.
- Chapter 3, "Engagement in a Third-Party-Managed Virtual Community and Its Effect on Customer Identification," analyzes the components that generate users' engagement in a third-party-managed virtual community and these components' contribution to building user identification with the community.
- Chapter 4, "Service Innovation for Customer Engagement in the Italian Banking Sector: A Case Study," aims to investigate the role of service innovation in customer engagement in the banking sector and analyzes the effects of innovative services on customer satisfaction through the study of an Italian people's bank and the application of the Kano model.
- Chapter 5, "Understanding Fluency and Friction in Customer Experience Management," attempts to provide a framework on how customers perceive touch-points as a holistic experience and proposes an integrated approach to measuring the experience of challenges that result in what we call "friction".
- Chapter 6, "Customers' Generational Differences Regarding In-Store Shopping Experiences," identify customers' needs in regard to in-store shopping experiences and to examine these results with specific reference to generational differences between the senior and younger customers.
- Chapter 7, "The Influence of Retailer Choices on Consumer Behaviors and Sales Productivity," examines customers' needs in regard to in-store shopping experiences and to examine these results with specific reference to generational differences between the senior and younger customers.

Chapters 8 to 11 provide some insights about the digitalization of retail and metamorphosis of retail environment. In this way:

- Chapter 8, "Effect of E-Retail Product Category on Performance," uses concepts of information economics, e-retailing, and the search-experience-credence (SEC) categorization of products to develop theoretical hypotheses and contends that the ease to evaluate retail products online has a positive effect on sales volume of e-retail firms.
- Chapter 9, "Assessing the Power of Social Media Influencers: A Comparison Between Tourism and Cultural Bloggers," examines to what extent cultural and tourism social media influencers are able to influence their followers' consumption decisions and provides new evidence based on data collected among 341 followers of hospitality & tourism bloggers and 208 followers of cultural bloggers in Italy.
- Chapter 10, "Strengths of Online Travel Agencies From the Perspective of the Digital Tourist," assesses at solving three main research questions: what is the current position of online tourism retailers as indirect channels in the online tourism distribution system? What are the strengths of OTAs as seen by their customers? And, how should OTAs face the future?
- Chapter 11, "Conceptualization and Measurement of Smart Shopping," offers a critically review on "smart shopping" with the aim of improving understanding of this phenomenon and suggesting future lines of research that could help deepen the knowledge about smart shoppers.

The next two following chapters provide an overview of value co-creation in the retail context. So:

- Chapter 12, "How Smartness Enables Value Co-Creation: An Explorative Study of Italian Fashion Retail," investigates the way retailers manage digital tools. Embracing the framework of S-D Logic the analysis shapes the role that the digital technologies have in digital process re-configuration as well as in the shaping of specific context or platform able to boost the emergence of retail service innovation.
- Chapter 13, "The University in a Retail Context: An Illustration of Value Co-Creation Through the Social Business Model Canvas," is a case-based study aiming to describe, through the Social Business Model Canvas, the founding of an organic shop within a university that is supplied by administrative staff of the university that are at the same time also local farmers.

Finally, the last two chapters address issues concerning shopping options. Thus:

- Chapter 14, "Relational Proximity With Customers in the Retail Industry," uses a theoretical background to identify and explain a new proximity concept in retail sector. In particular, adopting a marketing and management approach, an innovative type of 'proximity' is presented, explaining a set of numerous elements and relationships that could link retailer, customer and territory: 'the relational proximity'.
- Chapter 15, "Adolescent Influence in Family Purchase Decisions," offers a contribution to companies by providing evidence of adolescent's influence in family purchase decisions. It is important that producing companies and retailer marketers focus their efforts on adolescent satisfaction.

Chapter 1
Retail Customer Engagement:
A Systematic Mapping Study

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ABSTRACT

Customer engagement is one of the most debated topics in marketing literature. The great interest of the scientific community resulted in a large amount of research on this topic making it difficult for scholars to understand how to really contribute to advance the research. Based on these considerations, this chapter aims to provide an overview of the research findings and trends of previous studies to guide the researcher to the most influential works, results, and issues that need more insights. In particular, this chapter offers a literature review on customer engagement and retail customer engagement using bibliometric analysis and scientific mapping study. Results show the most productive authors, most cited publications, most frequent words, and clusters of related words. The analysis provides a description of the state of the art of retail customer engagement and suggests future research directions.

INTRODUCTION

Over the last decades, the marketing literature has evolved towards an increasing consideration of customers in business strategies: progressively focusing on their satisfaction, loyalty, involvement, commitment and value co-creation, and leading to the blurring of boundaries between companies and customers (Jaakkola & Alexander, 2014).

Several marketing studies have shown that a sustainable competitive advantage depends on the company's ability to maintain, sustain and nurture its customer base (Anderson, Fornell & Mazvanchery, 2004; Gruca & Rego, 2005; Rego, Billett & Morgan, 2009) stimulating behaviors that go beyond mere repurchase behaviors (van Doorn et al., 2010).

The concept of customer engagement aggregates the multiple ways customer behaviors beyond transactions may influence the firm (Brodie et al., 2011; Leeflang, 2011).

According to the Marketing Science Institute (2010), customer engagement is a fundamental research area for a better understanding of consumer behaviors in complex and interactive environments such as the current ones. For these reasons, customer engagement studies have spread widely in the marketing literature. However, there is still no shared definition of the term, nor shared recognition of its dimensions or differences with other similar relational terms, including "participation", "commitment" and "involvement". The most recurrent definition in marketing studies is that of van Doorn et al. (2010), who defined customer engagement as customer's behavioral manifestations that have a brand or firm focus, beyond purchase, resulting from motivational drivers.

With regard to its dimensions, part of the literature attributes to customer engagement a behavioral dimension, while other authors a cognitive / emotive dimension. Some scholars, instead, define it as a multidimensional concept that includes both behavioral and cognitive aspects.

There is still a lot of confusion about the meaning of customer engagement, its dimensions, the behaviors or psychological states that characterize it, the effects it produces on a company performance, especially in the retail sector where studies are still lacking. It is therefore difficult for scholars to understand how to really contribute to advance the research on this topic. Based on these considerations, this chapter aims to provide an overview of the research findings and trends of previous studies to guide the researcher to the most influential works, results and issues that need more insights. In particular, this chapter offers a review of the literature on customer engagement in general and in the retail sector specifically, using bibliometric analysis and scientific mapping study.

A synthesis of the results of past research is fundamental to the progress of a particular field of research. The most used methods for summarizing previous results are the qualitative approach of literature review and the quantitative meta-analysis approach (Schmidt, 2008). However, these methods have some limitations such as the lack of methodological rigor that often exposes the analysis to the researcher's prejudices (Tranfield, Denyer & Smart, 2003). The bibliometric methods, instead, introduce a systematic, transparent and reproducible review process and have the advantage of directing the reader immediately to the most influential works identified through objective and quantitative indicators (Moretta Tartaglione et al., 2019). Bibliometric methods have spread widely with the online introduction of databases containing citation data (e.g. Thomson Reuters Web of Science, WOS) and the development of software that facilitate the conduct of bibliometric analysis (e.g. BibExcel).

In recent years, scientific mapping has been introduced in the field of bibliometric methods to monitor the cognitive structure of a scientific field and its evolution (Noyons, Moed, & van Raan, 1999). Examining the correlations between the various works, in terms of words, authors, fields (Small, 1999), scientific mapping aims to show the structural and dynamic aspects of scientific research (Börner, Chen, & Boyack, 2003; Morris & Van Der Veer Martens, 2008; Noyons, Moed & Luwel, 1999).

Several authors emphasize the usefulness of these methods in the quantitative and objective organization of information within a scientific field (Albort-Morant & Ribeiro-Soriano, 2016; Rey-Martí, Ribeiro-Soriano, & Palacios-Marqués, 2016) as well as in the analysis of the relevance of the various research topics within a domain and their relationships (Chen & Xiao, 2016).

2

Bibliometric methods have been used to map the fields of strategic management (e.g. Di Stefano, Verona, & Peteraf, 2010; Nerur, Rasheed, & Natarajan, 2008; Ramos-Rodriguez & Ruiz-Navarro, 2004), customer loyalty (Siemieniako, 2018; Moretta Tartaglione et al., 2019); consumer-brand relationships (Fetscherin & Heinrich, 2015), brand personality (Llanos-Herrera & Merigo, 2018; Radler, 2018), corporate branding (Fetscherin & Usunier, 2012).

The chapter is structured as follows: first, the method used for conducting the analysis is described; second, the bibliometric findings of the searches on customer engagement in general and in the retail sector are discussed; thirdly, based on the results of bibliometric mapping, customer engagement is analyzed in relation to its most associated marketing topics such as social media, value co-creation and customer satisfaction. Finally, conclusions and research implications are provided.

METHOD

This work is based on a bibliometric analysis and a mapping study of the contributions on customer engagement in management and marketing literature with a particular focus on the retail sector.

Document information was recovered from the Web of Science's SCI-Expanded by Thomson Reuters because of its multidisciplinary and comprehensiveness (Waltman, 2016). In fact, it comprises three citation indices (Science Citation Index Expanded, Social Sciences Citation Index and Arts & Humanities Citation Index) and includes social sciences literature (Norris & Oppenheim, 2007).

Two searches were carried out: the first by searching in the TOPIC for "customer engagement" OR "consumer engagement", Refined by Web Of Science Categories=(Business Or Management Or Economics Or Communication), Timespan=All years; the second by searching in the TOPIC for "customer engagement" OR "consumer engagement" AND retail, Refined by: Web Of Science Categories=(Business Or Management Or Communication Or Economics), Timespan=All years.

The search was conducted during July 2018.

For each of the two searches conducted, a unique data base was created in a flat file containing information about authors, year of publication, type of research, country, field of research, key words and cited references. Through a bibliometric analysis of that information, the total publications and the sum of times cited by year, the most cited authors and productive countries were identified. Moreover, the most cited publications were selected creating a top 10 of those about customer engagement and a top 5 of those about retail customer engagement (given the lower number of results).

In a second phase, scientific maps were constructed within each area using the SciMAT software developed by the "SECABA" group of the University of Granada (Cobo et al., 2012).

To perform the analysis, the following configuration has been established in SciMAT: word as a unit of analysis, co-occurrence analysis as a tool for building networks, index of equivalence as a measure of similarity for normalizing networks, the H-Index to detect their relevance and the algorithm of simple centers as a clustering algorithm to detect clusters or themes (Castillo-Vergara et al. 2018). The analysis provides an evaluation map for each topic with the most recurrent words and their relevance in the analyzed publications and creates clusters of words showing graphically the relevance and the links between words in each cluster.

BIBLIOMETRIC ANALYSIS

Customer Engagement

The first search returned a total of 496 publications from 2005 to 2018, of which 276 in the business field, 168 in Management, 31 in Economics and 21 in Communication. Publications on customer engagement started from 2005 but they grew exponentially since 2015 reaching a pick in 2017. Because the search was conducted in July 2018, a confirmation of growth is assumed also for 2018 (Figure 1). The same is for citations that started growing rapidly since 2016, reaching 1700 citations in 2017 (Figure 1).

As the most productive authors we find Linda D. Holleebek, Roderick J. Brodie, and Jodie Conduit. The majority of publications have been published in the United States (Figure 2).

Table 1 shows a top ten of the most cited works on customer engagement.

By analyzing these papers, it emerges that they attempt to provide definitions, conceptualizations, propositions or dimensions of the customer engagement construct, confirming the interest of marketing scholars for a clarification and better understanding of this topic. The most cited paper (van Doorn et al., 2010) provides the most recurrent definition of customer engagement in the literature: the customers' behavioral manifestation toward a brand or firm, beyond purchase, resulting from motivational drivers.

Figure 1. Publications and citations distribution by year
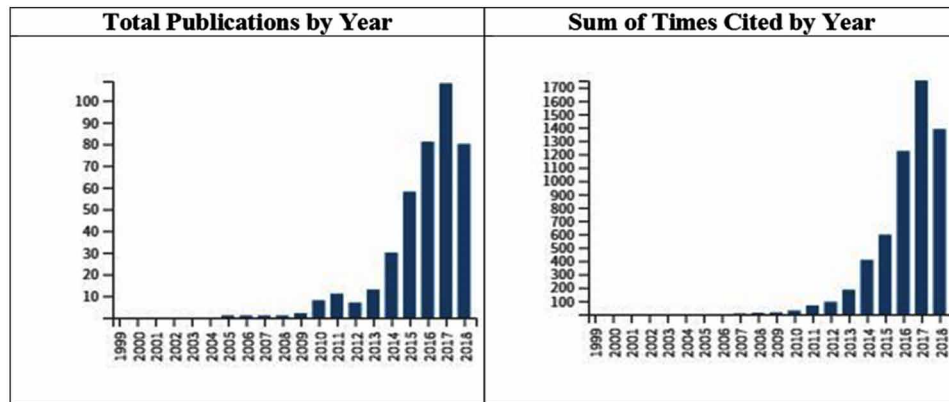
Figure 2. Most productive authors and countries

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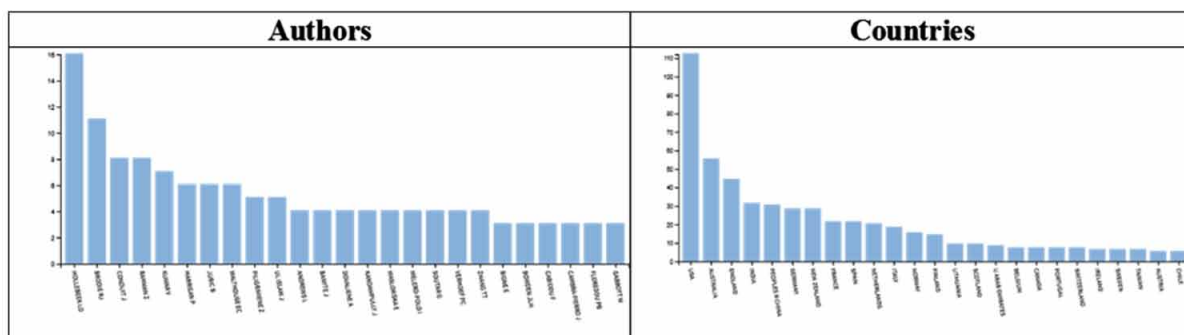
Table 1. Top 10 of the most cited works on customer engagement

Authors	Publication Year	Title	Total Citations	Average per Year
van Doorn, J.; Lemon, K. N.; Mittal, V.; Nass, S.; Pick, D.; Pirner, P.; Verhoef, P. C.	2010	Customer Engagement Behavior: Theoretical Foundations and Research Directions	485	53,89
Brodie, R. J.; Hollebeek, L. D.; Juric, B.; Ilic, A.	2011	Customer Engagement: Conceptual Domain, Fundamental Propositions, and Implications for Research	430	53,75
Brodie, R. J.; Ilic, A.; Juric, B.; Hollebeek, L.	2013	Consumer engagement in a virtual brand community: An exploratory analysis	407	67,83
Kumar, V.; Aksoy, L.; Donkers, B.; Venkatesan, R.; Wiesel, T.; Tillmanns, S.	2010	Undervalued or Overvalued Customers: Capturing Total Customer Engagement Value	250	27,78
Hollebeek, L. D.; Glynn, M. S.; Brodie, R. J.	2014	Consumer Brand Engagement in Social Media: Conceptualization, Scale Development and Validation	238	47,6
Verhoef, P. C.; Reinartz, W. J.; Krafft, M.	2010	Customer Engagement as a New Perspective in Customer Management	210	23,33
Sashi, C. M.	2012	Customer engagement, buyer-seller relationships, and social media	200	28,57
Jaakkola, E.; Alexander, M.	2014	The Role of Customer Engagement Behavior in Value Co-Creation: A Service System Perspective	153	30,6
Wirtz, J.; den Ambtman, A.; Bloemer, J.; Horvath, C.; Ramaseshan, B.; van de Klundert, J.; Canli, Z. G.; Kandampully, J.	2013	Managing brands and customer engagement in online brand communities	125	20,83
Jahn, B.; Kunz, W.	2012	How to transform consumers into fans of your brand	125	17,86

The authors also identify the behaviors included in customer engagement (word-of-mouth, recommendations, helping other customers, blogging, writing reviews, and even engaging in legal action) and develop a conceptual model of its antecedents and consequences.

In their work, Brodie et al. (2011) explore the theoretical foundations of customer engagement by drawing on the relationship marketing theory and the Service-Dominant logic (S-D logic) (Vargo & Lush, 2004, 2008). They examine the use of the term ''engagement'' in different scientific fields and in business practice applications and propose five fundamental propositions used to develop a general definition of customer engagement distinguishing the concept from other relational concepts such as ''participation'' and ''involvement''.

Brodie et al. (2013), through a review of the literature conducted with the netnographic method, reveal the multidimensional, complex and dynamic nature of consumer engagement, which includes a series of sub processes such as loyalty, satisfaction, empowerment, connection, emotional bonding, trust and commitment.

Another widely cited work is that of Kumar et al. (2010), who propose four components of the customer engagement value with a firm: customer lifetime value (the customer's purchase behavior), customer referral value (incentivized referral of new customers), customer influencer value (the customer's behavior to influence other customers), and the customer knowledge value (the value added to the firm by feedback from the customer).

Hollebeek et al. (2014), on the other hand, analyze consumer-brand engagement and identify three dimensions: cognitive processing, affection, and activation. The authors elaborate and validate a 10-

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item model for measuring consumer-brand engagement and conduct an empirical analysis from which it emerged that one of its antecedents is brand 'involvement' while consumer 'self-brand connection' and 'brand usage intent' are its consequences.

Identifying the antecedents and the consequences of customer engagement is a very important issue for marketing scholars, many of whom have adopted the conceptual model proposed by Verhoef et al. (2010) to measure the antecedents, impediments, and firm consequences of customer engagement.

Sashi (2012) develops a model that identifies the different stages of the customer engagement cycle: connection, interaction, satisfaction, retention, loyalty, advocacy, and engagement. Each stage is characterized by a different degree of relational exchange and emotional bonds in the relationship between customers and the firm. Four types of relationships emerge: transactional clients, satisfied customers, loyal customers and fans.

The work of Jaakkola and Alexander (2014) represents another important attempt to conceptualize customer engagement. Combining the theoretical perspectives of customer engagement with the research on value co-creation, the authors analyze the behaviors of engaged customers in a multi-stakeholder service system. The results show that through these behaviors, customers bring resources to the firm and other interested parties that improve the offer and influence the perceptions, preferences, expectations or actions of other stakeholders making value co-creation a system level process.

In the work of Wirtz et al. (2013), customer engagement is examined in online brand communities and four key dimensions (brand orientation, Internet use, financing and governance) and three antecedents (related to the brand, social and functional) are identified.

The paper of Jahn and Kunz (2012), instead, defines the level of use of online services on the company fan page as a manifestation of customer brand engagement and identifies values such as functional and hedonistic content as drivers of such participation.

Retail Customer Engagement

The search on customer engagement in the retail context returned only 20 publications from 2014 to 2018, of which 5 in the Management field, 13 in Business, 2 in Economics, and 1 in Communication. The interest for customer engagement in the retail sector became to be consistent only in 2016 and citations started to growth since 2017 (Figure 3).

As the most productive authors we find René Algesheimer, Raed S. Algharabat and Chrysovalantis Amountzias. The majority of publications have been published in Australia, England and United States (Figure 4).

In the case of studies in the retail sector, only the top 5 of most cited works were analyzed because of the reduced numbers of papers and citations yielded by the search (Table 2).

The research on antecedents and consequences of customer engagement is particularly important also in the retail context, as emerges by the analysis of the most cited works. For example, Celuch et al. (2015) consider consumer feedback as a behavior of engaged customers and examine its antecedents in the retail context. Their results show that the main antecedent of consumer feedback is the consumers' perception of the social benefits related to their feedback and that the impact of social benefits will be stronger when the engagement to the retailer is higher.

The work of Giannakis-Bompolis and Boutsouki (2014) aims to estimate the degree to which Customer Relationship Management (CRM) practices in the retail sector (particularly in the banking sector) affect customer engagement. The results show that an increase in customer engagement depends on the

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Figure 3. Publications and citations distribution by year
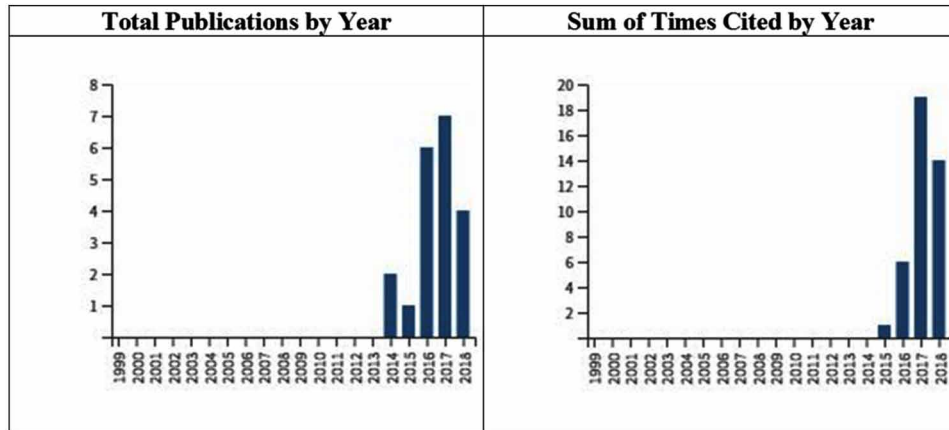
Figure 4. Most productive authors and countries
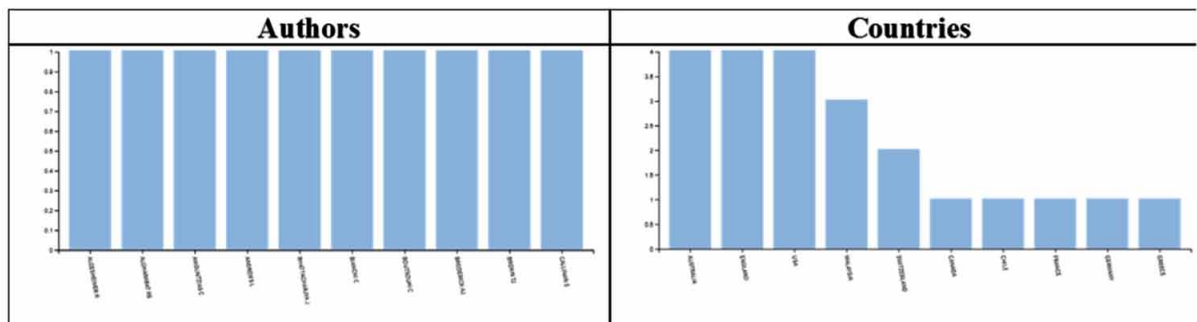
Table 2. Top 5 of the most cited works on retail customer engagement

Authors	Publication Year	Title	Total Citations	Average per Year
Celuch, K.; Robinson, N. M.; Walsh, A. M.	2015	A framework for encouraging retail customer feedback	8	2
Giannakis-Bompolis, C.; Boutsouki, C.	2014	Customer Relationship Management in the Era of Social Web and Social Customer: An Investigation of Customer Engagement in the Greek Retail Banking Sector	8	1,6
So, K. K.; King, C.; Sparks, B. A.; Wang, Y.	2016	Enhancing customer relationships with retail service brands The role of customer engagement	7	2,33
Zablah, A. R.; Carlson, B. D.; Donavan, D. T.; Maxham, J. G.; Brown, T. J.	2016	A Cross-Lagged Test of the Association Between Customer Satisfaction and Employee Job Satisfaction in a Relational Context	5	1,67
Schultz, C. D.	2016	Insights from consumer interactions on a social networking site: Findings from six apparel retail brands	4	1,33

ability of CRM policies to increase the level of customer overall satisfaction and their commitment to the bank, as well as on the active presence of the bank on social media.

So et al. (2016) adopt a structural model to conduct two separate studies: the first shows that customer engagement plays a significant role in building the quality of the customer-brand relationship; the second shows that customer engagement increases customer loyalty to the retail brand.

Zablah et al. (2016) conduct an empirical investigation on the satisfaction of customers and frontline employees of 209 retail stores, discovering that customers and employees satisfaction are mutually correlated and the effect of customer satisfaction on employee satisfaction is predominant; in this relationship customer engagement determines the extension of this predominance.

Finally, Schultz (2016) analyzes several social metrics across three levels of engagement on social networking sites identifying insights that a retail brand can derive from consumer social interactions about a competing retail brand. The author proposes a framework for identifying the brand strategies on social networking sites by evaluating posting and response behaviors, which appear to be the core elements of brands positioning.

SCIENTIFIC MAPPING STUDY

Customer Engagement

From the mapping analysis of papers on customer engagement an evolution map emerges, showing seven relevant nodes. These nodes represent the most frequent words in the analyzed documents, as well as the most cited and relevant ones based on H-Index. As Figure 5 shows, after customer engagement, the most frequent, relevant and cited topics are service marketing, word-of-mouth, firm-performance, trust, participation, and motivation.

At each node the software identifies a cluster of related words. The first cluster shows that social media is the topic more strongly related to customer engagement (Figure 5). According to several au-

Figure 5. Evolution map and cluster 1
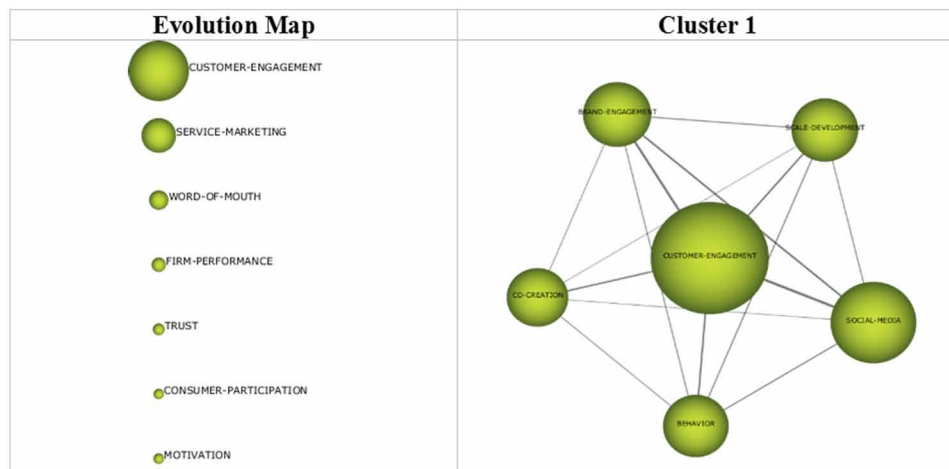
thors, social media provide numerous venues for consumers to share their views, preferences, or experiences with others consumers and with the company itself, stimulating several behaviors characterizing customer engagement such as word-of-mouth and feedback, and also enabling value co-creation paths between customers and firms. Particularly, with the proliferation of online brand communities high levels of customer-brand engagement emerged. The works belonging to this cluster show a great interest in the development of measurement scales able to operationalize and measure these constructs and their correlations generally using the method of the structural equation modeling.

The central node of the second cluster is service marketing (Figure 6). During the last decade, with the development of service theories in marketing literature, such as S-D logic and Service Science (Maglio & Sphorer, 2008), the role of interactive customer experience and co-created value has become predominant, providing the broader conceptual domain within which customer engagement is embedded. In this perspective, engagement is related to interactive customer experiences with specific firm elements such as the brand. The works focused on identifying the antecedents and consequences of customer engagement considering the variables of consumer perspective, customer satisfaction and loyalty by different point of view. In some cases, the dimensions of satisfaction and loyalty have been considered as consequences of customer engagement, in other cases customer engagement has been described as an iterative process that starts with customer satisfaction, transits for commitment and trust and culminates in customer loyalty. Even innovation has been defined as both an antecedent and a consequence of customer engagement. As antecedent, innovative products/services increase the value perceived by customers who are expected to share them with others and engage with the company or brand. As consequence, innovation is improved by the participation of the engaged customers in the different phases of new product/service development as primary source of knowledge in the design phase.

The third cluster rotates around the node of word-of-mouth, which is considered the principal customer engagement non-transactional behavior (Figure 6). Word-of-mouth is influenced by the CRM strategies aimed at stimulating the active participation of customers, particularly in online communities and companies' websites where customers review products or services by delivering comments on their experience with a firm. Customers' feedback represents a useful source of information for a company

Figure 6. Cluster 2 and cluster 3
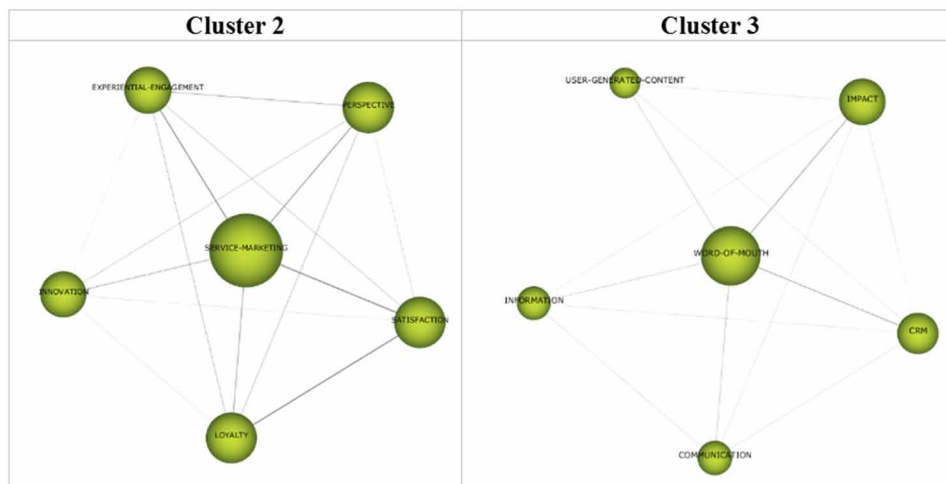
about their satisfaction, fundamental to improve quality and engage customers on the basis of user generated contents. These platforms are also viewed as tools to foster consumers' communication with other consumers and with a company itself that can exploit these virtual spaces to increase commitment by answering customers' comments. These processes have a strong impact on a company's marketing strategies.

In cluster 4 the central node is firm performance. Firm performance is enhanced by market-oriented strategies that make it possible to create commitment to the company. Committed customers are very satisfied customers who feel an emotional attachment to the company, consider it superior to others, and are less sensitive to competitors' strategies. They are very important for the company's competitive advantage being able to enhance its performance through repurchase and word-of-mouth behaviors. Moreover, committed customers represent an important source of knowledge for the product development providing valuable insights and feedback through which it is possible to design products able to satisfy the specific needs of customers. In complex and dynamic environments, such as the current one, the ability of a company to sustain and grow its performance depends largely on its dynamic capabilities. The dynamic capabilities perspective (Teece, Pisano & Shuen, 1997) is aimed at overcoming the Resource-Based view (Barney, 1991), arguing that the viability and growth of firms derive from their ability to create, adapt or modify their resources and competencies in response to the context and market changes.

Cluster 5 is focused on the consumer trust that occurs when the consumer believes that the company will implement activities resulting in positive outcomes, as well as it will not take sudden actions resulting in negative outcomes. This belief is influenced by the corporate reputation, represented by the collective assessments of a corporation's past actions and the ability of the company to deliver improving business results to multiple stakeholders and satisfy customers over time. Hence, quality, measured by customer satisfaction, is a dimension essential to improve firm reputation and enhance consumer trust. Customer involvement, defined as the amount of physical and mental effort that a consumer puts into a purchase decision, joint to satisfaction represent the main antecedents of consumer trust, which in turn improve customer retention. These topics are mostly studied in the e-commerce context.

Figure 7. Cluster 4 and cluster 5
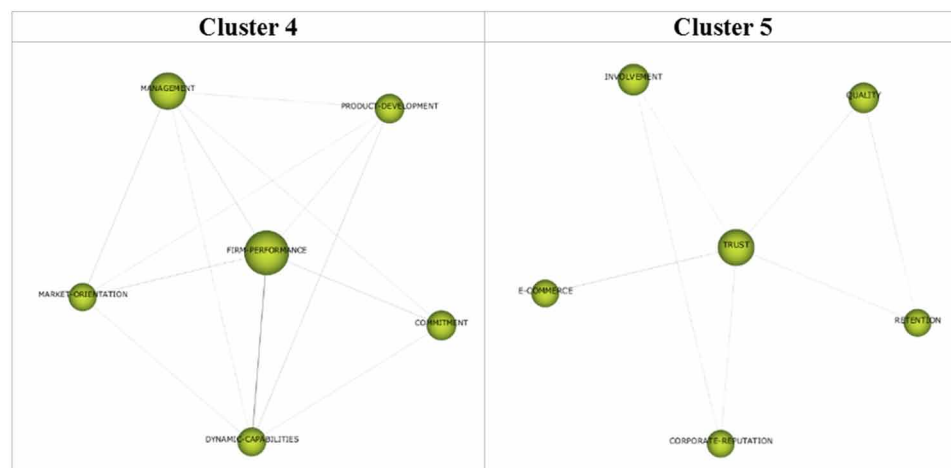
Retail Customer Engagement

The mapping study of the publications on retail customer engagement identifies an evaluation map that shows five nodes representing the most relevant and cited words in the documents analyzed: retailing, consumer perspective, customer relationship management, scale development and social media (Figure 8).

Cluster 1 detects a great correlation between retailing and brand engagement (Figure 8). Brand engagement identifies the level of the consumer's attachment towards a brand resulting in cognitive, emotional and behavioral activities during brand interactions. The engagement to a brand characterizes customers with a strong brand identification, self-identification and satisfaction with the brand, who purchase it consistently leading to brand loyalty. Brand engagement can be fostered by the firm capability to improve consumers' brand experience, for example within brand communities or stores. Service marketing provides new frameworks for the understanding of the interactions between providers and users stating that the moment of interaction is essential to involve consumers and engage them. Particularly, the Service-Dominant logic, which spread in marketing literature during last decade, introduces the value co-creation concept defined as the creation of a joint value through the application of competences and the integration of resources between providers and customers.

The second cluster focuses on the different perspectives of customer engagement (Figure 9). In literature, perspectives are sometimes multidimensional including cognitive, emotional, and/or behavioral dimensions, other times unidimensional with the prevalence of the behavioral dimension. The most debated emotional dimension is customer experience described as the way in which the customer perceives the interaction with a specific brand at the conscious and unconscious level. It is the emotion evoked in the customer by an action rationally planned by the company. As cognitive dimension, scholars focus on customer empowerment, which concerns the ability of consumers to acquire and process information, select and choose from various offers, and make more informed purchasing decisions. Finally, the behavioral dimension is co-creation, which consists of several behaviors through which customers participate to the value creation with the firm. Yi and Gong (2013) identify two categories of co-creative

Figure 8. Evaluation map and cluster 1
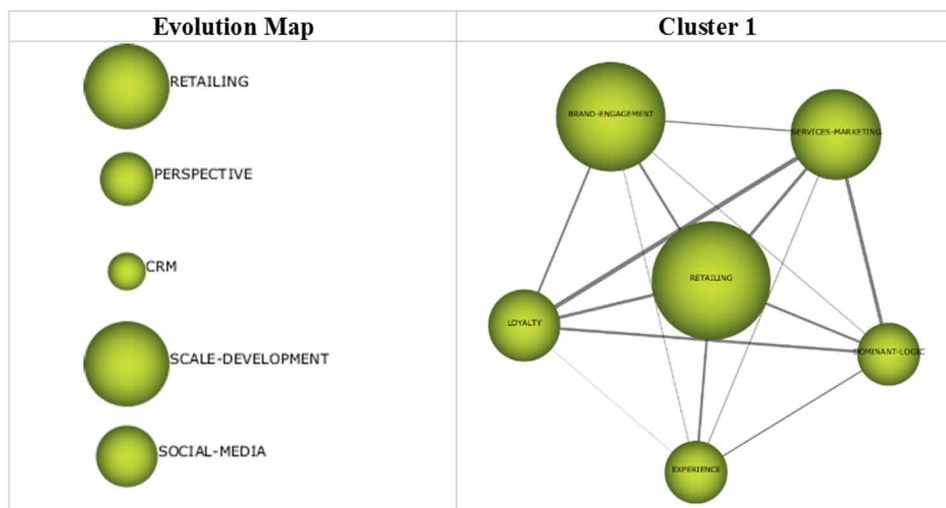
Figure 9. Cluster 2 and cluster 3
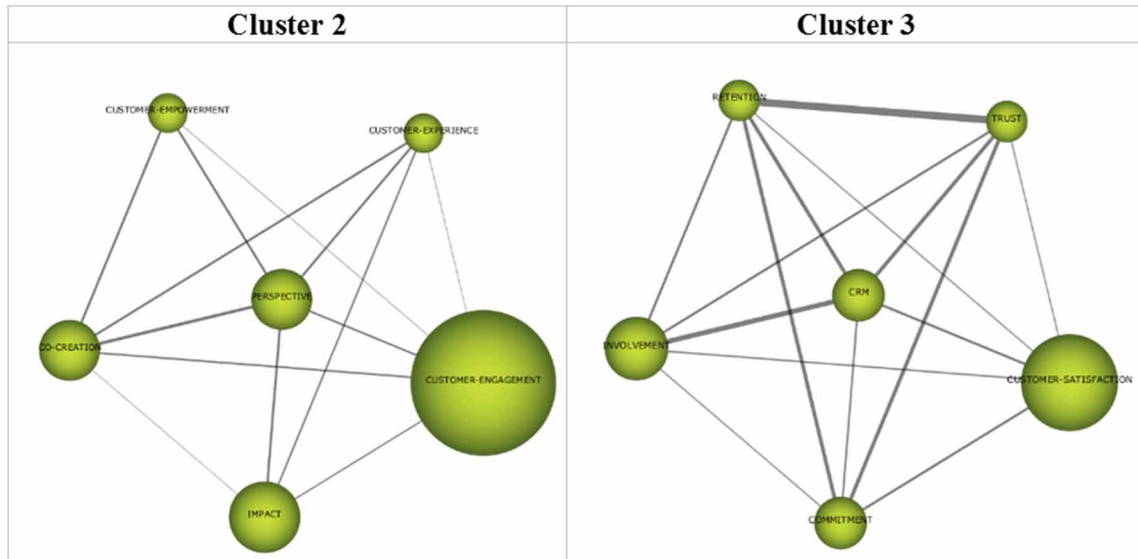
behaviors: 1) participation behaviour, which include, among others, the search for information, information-exchange, responsible actions and positive attitude during personal interactions; 2) citizenship behavior, which include, among others, the provision of feedback, service promotion to other people, helping other customers and tolerance towards service failures. The impact of all these dimensions on customer engagement is an issue of great relevance within studies on retailing.

The third cluster explains the main results of Customer Relationship Management (CRM) strategies on consumers' dimensions like consumer trust and consumer commitment (Figure 4). CRM policies are principally aimed at increasing customer satisfaction, which is considered an antecedent of consumer trust, commitment and involvement. Part of the literature considers the increase in trust and commitment a consequence of CRM policies. Other scholars consider commitment and trust key elements of relationship marketing, and not only consequences, because they encourage marketers to work at preserving relationship investments. CRM, by increasing consumer commitment and trust, contributes to create customer retention.

The fourth cluster shows a great interest of the literature in the development of empirical models able to measure customer engagement. The attention is on the identification of customer behaviors able to explain engagement as a second-order construct and on the measurement of the influence of such behaviors on product/service quality and firm performance. In last years, scientific efforts are centered on trying to measure online engagement in web 2.0 sites as a second-order construct of the engagement manifested in various first-order experiences.

Finally, cluster 5 rotates on the important node of social media. With the emergence of e-commerce and social networks, relationships between retailers and customers are turning more and more from physical to virtual interactions. Retailers have to rethink the ways they manage relationships and define new marketing strategies able to capture the several opportunities social media offer, such as the management of word-of-mouth in company's web site, fan pages and online brand communities in order to acquire important information on customer satisfaction and needs that facilitate the firm's decision-making.

Figure 10. Cluster 4 and cluster 5
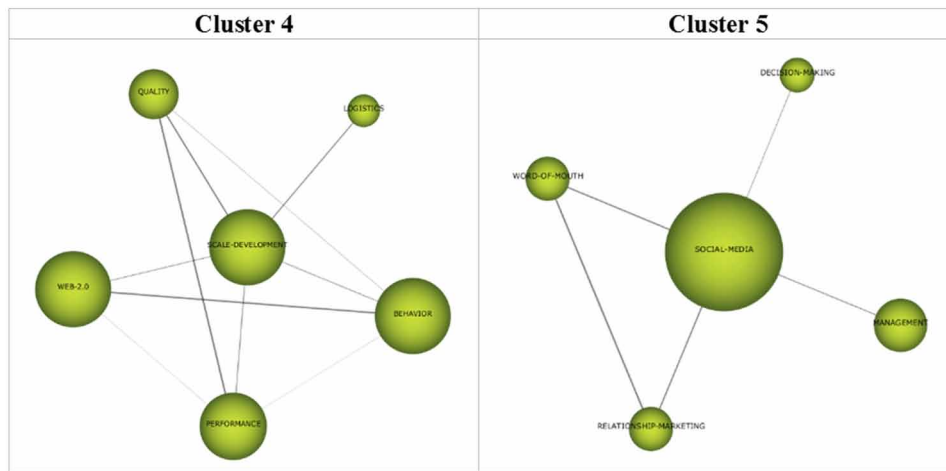
CONCLUSION

Customer Engagement

Customer engagement is one of the most debated topics in management and marketing literature. The interest of scholars about customer engagement started from 2005 and it is still growing in the scientific community. By analyzing the contributions in this research area, it emerges that the focus is on the analysis of the attitudinal and behavioral dimensions of customer engagement, its antecedents and consequences, and its evolution on social media.

Customer engagement facilitates favorable attitudes towards a product, company or brand (Vivek et al., 2012), creating emotional bonds in relational exchanges (Sashi, 2012) and positively influencing customer loyalty (Vivek et al., 2012). Several authors argue that customer engagement goes beyond the mere dimension of action and incorporates both psychological and behavioral dimensions (Patterson et al., 2006; So et al., 2014; Vivek, 2009; Brodie et al., 2011). So et al. (2014) define customer engagement as the personal connection of a customer to a brand that manifests itself in cognitive, affective and behavioral responses beyond purchasing. The authors have operationalized customer engagement as a higher order construct comprising five first-order factors, which are enthusiasm (or vigor), attention, absorption, interaction and identification.

The behavioral dimension of customer engagement is prevalent in the literature (Keiningham et al., 2007; Morgan & Rego, 2006). Different behaviors have been traced back to customer engagement, among which the cross-buying (Grace & O'Cass, 2005), word-of-mouth (de Matos & Rossi, 2008), recommendations and customer references (Jin & Su, 2009; Ryu & Feick, 2007), blogs and postings on the web (Chevalier & Mayzlin, 2006; Hennig-Thurau et al., 2010).

Jaakkola and Alexander (2014) identify four categories of engagement behaviors:

- **Augmenting Behaviors:** Behaviors through which customers contribute to directly augment and add to the firm's offering by applying resources such as knowledge, skills, time and work.

- **Co-Developing Behaviors:** Behaviors through which customers contribute to the development of the offering by applying resources such as knowledge, skills and time.
- **Influencing Behavior:** Behaviors through which customers contribute to influence the perceptions, preferences or knowledge of other actors regarding the company by applying resources such as knowledge, experience and time.
- **Mobilizing Behaviors:** Behaviors through which customers contribute to mobilize other stakeholders' actions towards the firm by applying resources such as relationships and time.

Customer satisfaction is considered the main antecedent of customer engagement, as only when the interactions between the company and the customer are satisfactory, they will remain connected and will continue to interact with each other progressing towards commitment (Littlechild, 2016). However, satisfaction is a necessary but not sufficient condition for customer engagement. In order to create engagement, satisfaction must evolve towards higher levels of interaction and active participation of customers in meeting their needs through involvement, commitment and empowerment (Firat & Dholakia, 2006).

Customer involvement refers to the amount of physical and mental effort that consumers put into a purchase decision to identify with product/service offerings their consumption patterns and behavior (Park et al. 2007).

Customer commitment reflects the desire and effort to maintain a relationship based on two main dimensions: affective commitment and calculative commitment (Gustafsson et al., 2005; Bowden, 2009a). Calculative commitment derives from a lack of choice or high switching costs; being more rational, it leads to higher levels of customer loyalty and lasting relationships with sellers (Iglesias et al. 2011; Han et al. 2018). The affective commitment derives from trust and reciprocity in a relationship; being more emotional, it leads to higher levels of trust and emotional ties in dealings with sellers (Gustafsson et al. 2005; Lee et al. 2007).

Another important antecedent of customer engagement is consumer trust. Engagement requires the establishment of trust in terms of security / reliability perceived by the consumer in interactions with the company and the belief that the company acts in the interests of consumers (Delgado-Ballester, Munuera-Aleman & Yaguèe- Guillen, 2003)

In the absence of trust, it is unlikely that the relationship will become lasting or intimate and customers become supporters of the firm. However, trust alone is not enough to transform the interaction into a long-term relationship but it must be accompanied by commitment (Verhoef et al., 2010).

Several authors indicate customer loyalty as a potential consequence of customer engagement (Bowden, 2009b; Patterson, Yu, & de Ruyter, 2006). Attitudinal customer loyalty refers to positive attitudes of customers toward a company or brand (McManus & Guilding, 2008; Oliver, 2014). Behavioral customer loyalty results in repurchasing behaviors (Richard & Zhang, 2012), positive word-of-mouth (Hajli et al., 2017), customer equity (Kim, Young & Ko, 2012), and in a lower customer sensitivity to the price and the offerings of competitors (Kim et al., 2008).

Another possible consequence of customer engagement is the increase in customer value (Verhoef et al., 2010). While traditionally customer value has been measured in terms of transaction value, Kumar et al. (2010) highlight that it should also include the value produced by non-transactional behaviors. In particular, the authors recognize three non-transactional values: Customer Reference Value (CRV), Customer Influence Value (CIV) and Customer Knowledge Value (CKV). van Doorn et al. (2010) believe that customer value should be measured by adding to the Customer Lifetime Value (CLV) a single value resulting from the engagement of the customer.

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Studies on customer engagement are often included in the broader conceptual domain of service marketing where, in the last decade, the S-D logic (Vargo & Lush, 2004, 2008) has become the dominant paradigm. According to this logic, engagement differs from other traditional relational concepts, including "participation" and "involvement", for the existence of interactive experiences with specific objects of involvement (e.g. the brand) (Giannakis-Bompolisa & Boutsoukib, 2014).

S-D logic identifies the customer's interactive experience and value co-creation as conceptual foundations of customer engagement. The literature on S-D logic emphasizes that value co-creation occurs within complex and dynamic network structures called service systems (Edvardsson, Tronvoll & Gruber, 2011; Maglio & Spohrer, 2008; Vargo & Lusch, 2011). Therefore, customer engagement behaviors contribute to the exchange of resources within the service systems and not the supplier-customer dyad (Nambisan & Baron, 2009; Schau, Muñiz & Arnould, 2009), influencing the processes of value creation at the system level.

Several authors argue that engaged customers are more likely to participate in the value co-creation with the company (Brakus, Schmitt & Zarantello, 2009; Prahalad & Ramaswamy, 2004).

According to Lusch and Vargo (2006), value co-creation occurs when customers participate in the creation of the main offer through application of skills and exchange of resources that result in co-design, formulation of suggestions to the company to improve products / services, helping other customers to consume better, release feedback, and other co-creative behaviors.

Therefore, the involvement of customers in the value co-creation becomes fundamental to improve company performance or customer value (Auh et al., 2007; Chan, Yim & Lam, 2010; Prahalad & Ramaswamy, 2004).

Among the business conditions necessary for successful value co-creation, scholars indicate lasting relationships between company and customer (Jaworski & Kohli, 2006; Prahalad & Ramaswamy, 2004), high quality interactions (Auh et al., 2007) and customer engagement behaviors (Jaakkola & Alexander, 2014).

Jaakkola and Alexander (2014), analyze value co-creation as integration of resources between customers and providers (Gummesson & Mele, 2010; Vargo & Lusch, 2011; Vargo & Lusch, 2008) in order to identify the various resources that consumers can contribute through the engagement behaviors and their potential drivers and results. According to Van Doorn et al. (2010), customers employ different resources such as time, money or actions that directly or indirectly influence the company.

Several authors state that social media represent the most important phenomenon supporting customer engagement as they offer an environment where consumers have the opportunity to acquire information, interact with the company, share their opinions, preferences or experiences with others (Thackeray et al., 2008; Trusov, Bucklin & Pauwels, 2009; Sashi, 2012; Wirtz et al., 2013; Jahn & Kunz, 2012). At the same time, social media offer companies the opportunity to communicate with customers and try to involve them through various initiatives, to know their opinions and their level of satisfaction, and to exploit the marketing WOM (Godes & Mayzlin, 2004; Hennig-Thurau et al., 2010). The interactive nature of social media allows firms to engage customers in content generation and value creation to the point that, in online communities, customers become active co-builders of life experiences and consumption meanings (Firat & Dholakia, 2006), and collaborate interactively to identify problems and develop solutions. Interactivity facilitates the creation of intimate and lasting relationships between sellers and buyers based on trust and commitment.

Among the different forms of online communities, the brand communities are those that have shown the highest levels of customer engagement (Wirtz et al., 2013). De Valck et al. (2009) define brand com-

munities as specialized and non-geographically bound online communities where consumers of a brand through social communications and relationships share an interest, which produces affinity, creates a bond and generates feelings of consumer empowerment (Cova & Pace, 2006). Consumers who join and actively participate in these communities are more likely to release feedback and receive recommendations from other community members, try out new products and are less sensitive to competitors' offerings (Thompson & Sinha, 2008), showing greater brand loyalty and customer advocacy (Algesheimer et al., 2005). Brand community members are interested in helping other members and willing to participate voluntarily in joint activities aimed at creating and co-creating value for themselves and others (Algesheimer et al., 2005; Porter & Donthu, 2008; Schau et al., 2009). These qualities make brand communities a powerful space for brand engagement (Brodie et al., 2011; Sawhney et al., 2005) which is defined as the level of the customer's motivational mental state, related to the brand and characterized by specific levels of cognitive, emotional and behavioral activity in interactions with the brand (Brodie et al., 2011; Hollebeek, Glynn & Brodie, 2014). Sprott, Czellar and Spangenberg (2009) define brand engagement as "an individual difference that represents the propensity of consumers to include important brands as part of how they look" (page 92).

Jahn and Kunz (2012) make a distinction between brand communities and fan pages. The latter are mainly driven by the company that uses them as an explicit channel of brand communication and interaction. The primary goal of a fan page should be to create a connection between the user and the brand, therefore, its use and engagement motivation may differ from traditional brand communities.

Retail Customer Engagement

The dissemination of scientific contributions in the specific retail area took place much later, starting from 2014. From the analysis of the publications on retail customer engagement, a strong attention of scholars on social media emerges. As a result of the ICTs development, the retail sector changed with the growth of online retailing (Suryandari & Paswan, 2014). The emergence of this new channel modified the nature of the relationship between consumers and retailers. In traditional sales channels, the strength of retailers is to have a direct contact with consumers during shopping, while in online channels the only possibility to interact with consumers is offered by websites and social media (So et al., 2016). These virtual places therefore become fundamental for the management of relationships aimed at increasing customer loyalty and engagement, and at times they present critical issues while at others they offer opportunities. Therefore, understanding how to create online customer engagement becomes necessary to maintain and improve relationships with customers (So et al., 2014, 2016).

In a contemporary retail environment, the engagement process involves consumers in offline and online contexts producing perceptions (positive or negative) of the brand image (Kumar et al., 2010). Whereas in traditional contexts the attributes of retailers able to influence engagement were mainly goods, shops, location, customer support and promotions (Sorescu et al., 2011), in online environments engagement is primary based on communication efforts (for example, product information published on the retailer's website, interaction tools, or other built-in features). Communication represent methods by which retailers can effectively translate the retail brand into an online context and build brand trust (Carlson et al., 2015; Kim & Stoel, 2004; Mukherjee & Nath, 2007; De Valck et al., 2009; Chan & Li, 2010; Wu et al., 2010).

Demangeot and Broderick (2016) studied how to activate customer engagement during a single visit to the website, analyzing how retail websites can engage customers during navigation. The results show

the existence of two distinct paths: experiential exploration that generates engagement in the activities; and informational exploration that develops engagement in the interaction. Unlike other authors who have privileged the communicative and experiential side of consumer interactions with websites (Richard & Habibi, 2016; Rose et al., 2012), this study shows an equally significant importance of the retail website's information for engagement. This means that in the absence of service personnel, the quality and completeness of information on a website can improve the relationship between the customer and the site, creating trust (Li et al., 2006; Porter & Donthu, 2008). Therefore, information and experiences in online shopping are both important to activate the engagement even when customers start browsing with purely utilitarian intentions (Malthouse & Calder, 2011; Rose et al., 2012; Ding et al., 2010).

Bhattacharjya et al. (2018) investigate the effectiveness with which parcel shipping companies use Twitter to foster customer engagement. The authors reveal that, due to the interactive nature of social media, the existing tools available to researchers and practitioners focused on the extraction of tweets are not enough because they do not consider conversations that provide useful insights about the engagement of customers over Twitter.

Giannakis-Bompolis and Boutsouki (2014) argue that the effectiveness of CRM practices on customer engagement also depends on the active presence of the retailer (in their specific case, a bank) on social media. The authors claim that the traditional CRM should be replaced by the Social CRM, which is defined by Greenberg (2010) as a business strategy supported by a technological platform designed to engage the customer in a collaborative conversation in order to obtain mutual benefits and a shared value in a reliable and transparent corporate environment. The Social CRM that uses Web 2.0 is also called CRM 2.0 and may be considered a new CRM environment in which companies have a double possibility of interaction with customers: directly, through discussions, or indirectly, through the analysis of content generated by customers (User Generated Content-UGC) (Faase, Helms & Spruit, 2011; Greenberg, 2010).

Celuch, Robinson and Walsh (2015) point out that in the literature related to retail customer engagement, customer-to-customer behavior is often analyzed, such as word-of-mouth (WOM) and advocacy, while little attention is paid to customer-to-business communication, such as customer feedback. For example, Verhoef et al. (2010) in their conceptual model on customer engagement, which is the most cited in the literature, do not consider feedback. The authors argue that advocacy is one of the most important non-transactional behaviors (Walz & Celuch, 2010) as it induces the client to promote or defend the company, the product or the brand helping to extend the firm's promotional budget. However, customer feedback (both positive and negative) should not be overlooked because it provides valuable information about what the company is doing right or wrong (Robinson, 2011). Feedback allows to understand if and how the organization is satisfying its customers, assessing customer perceptions and learning what customers want, need and know (Kumar & Bhagwat, 2010). Therefore, feedback allows a company to be market-oriented, meaning that a company has the potential to extend or create future value for itself and its customers.

FUTURE RESEARCH DIRECTIONS

The research on customer engagement has produced interesting results in terms of clarification of its dimensions, antecedents, consequences and emerging issues. However, some issues remain unsolved and need more effort by the scientific community.

Particularly, several scholars and professionals highlight the need for further studies aimed at a greater understanding of how customer engagement contributes to the processes of value co-creation (Bolton, 2011; Brodie & Hollebeek, 2011; Brodie et al., 2011). For example, scholars suggest further efforts to understand how organizations should acquire information on the resources that customers can apply in co-creation (Baron & Warnaby, 2011), the benefits and challenges arising from customer contributions (Hoyer et al., 2010), and the synergistic and iterative effects of customer engagement on the value co-creation by several actors in a network environment (Bolton, 2011; Brodie et al., 2013) that goes beyond the customer-supplier dyad (De Bruyn & Lilien, 2008; Dholakia et al., 2009), for example in brand communities (Brodie et al., 2013, Schau, Muñiz & Arnould, 2009). With regard to brand communities, there is need for more research on the nature of brand communities and their effect on consumer behavior (de Valck et al., 2009).

Some scholars also ask for further research on feedback antecedents defined as positive and negative comments, as well as suggestions for product / service improvements (Tronvoll, 2012); on the identification of more engagement behaviors that goes beyond transactions (van Doorn et al., 2010); on the development of empirical models able to operationalize and measure customer engagement and customer engagement value (Verhoef et al., 2010); and on studies aimed to better understand how customer engagement allows company to improve relationships with customers.

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KEY TERMS AND DEFINITIONS

Bibliometric Analysis: A quantitative analysis of academic literature based on metrics such as citations.

Customer Commitment: The customer's desire and effort to maintain a relationship with the company.

Customer Engagement: Customer's behavioral manifestations that have a brand or firm focus, beyond purchase, resulting from motivational drivers.

Mapping Study: A quantitative analysis of the cognitive structure of a scientific field and its evolution that shows the structural and dynamic aspects of scientific research.

Retail: The process of selling consumer goods or services to customers through multiple channels of distribution.

Social Media: Websites and applications that enable users to create and share content or to participate in social networking.

Value Co-Creation: The application of resources and exchange of competencies during the interactions between customers and providers for the creation of a shared value.

Chapter 2
An Action-Based Approach to Retail Brand Engagement

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ABSTRACT

Academics have embraced "engagement" and produced thousands of articles related to the topic. Despite the attention though, the literature remains confusing as to exactly what "engagement" is and what "engagement" is not. A brief history of evolution of academic perspectives on engagement, including both conceptual and empirical works, is provided to demonstrate the ambiguous nature of this topic. This chapter attempts to shed some light on delineating engagement through illustrations drawn from retailer activities that represent attempts to engage consumers. Specifically, the chapter focuses on Walmart's and Amazon's engagement tactics. The activities are classified using a theoretical taxonomy. In the end, the chapter intends to aid future engagement in engagement research.

AN INTRODUCTION TO ENGAGEMENT

Firms attempt to engage customers in many ways. Red Bull invites engagement by presenting original video content online. More than 7.5 million consumers subscribe to the Red Bull Youtube channel, which has been viewed 2 billion times in total (Youtube, 2018). Not all engagement marketing tactics find such success and sometimes, they can even backfire. McDonalds created #McDstories as part of a campaign promoting the company's use of local farm products only to have #McDstories taken over by consumers Tweeting food horror stories, often involving McDonalds' food (Lubin, 2012). Firms invest in customer engagement tactics in pursuit of a more loyal and passionate customer base (Ross et al., 2017).

Each point of engagement represents a touchpoint for the brand and subsequently creates the potential for value creation. Indeed, the most critical points of engagement occur when consumers become customers by interacting with retailers at the point of sale. Post-sale, today's satisfied (and dissatisfied) customers have more ways than ever to spread positive (negative) WOM (mouth and mouse) and encourage others to get engaged as well. Contrary to popular belief, engagement is not always positive. Customers, or even non-customer consumers, negatively engage with brands by proliferating negative word of mouth and sometimes even creating fictitious, negative online reviews. Thus, negative engagement occurs either when consumers perceive something to have gone wrong in the firm's marketing mix or service delivery for which consumers hold the brand accountable or when people intentionally spread negative brand information, with little regard to its truth, out of pure animus or as part of a fraudulent pay for review scheme. Negative engagement may not just result in a loss of potential customers, but also a loss in confidence by investors. As one recent study found, publically announced engagement initiatives, on average, decreased the market value (stock price) of firms (Beckers et al., 2018).

The marketing literature clearly has embraced the engagement concept. As evidence, the exact term "customer engagement" generates 15,000 post-2014 hits on Google Scholar. Despite all the evidence of academics' engagement with the engagement concept, the recent literature continues to include conceptual articles trying to define engagement and related concepts (Brodie et al., 2013; Hollebeek et al., 2014, 2016; Pansari & Kumar, 2017). Thus, although the literature is replete with use of "consumer engagement" and "customer engagement," researchers do not show clear consensus on just what "customer engagement" or "consumer engagement" means. Across the growing base of engagement literature, the question of what engagement is NOT is often overlooked. Is customer engagement distinct from customer involvement, interest, attitude, attention, affect, volition, and/or actual customer behavior? Engagement is, if it is unique in some sense, perhaps more defined by actions, such as patronage and word of mouth, and not by muted attitudes or volitions. Indeed, the most recent literature on customer engagement places particular emphasis on the behavioral aspect, even going so far as to define engagement as customer engagement behavior (CEB) which can be manifested in four distinct ways (Roy et al., 2018).These behaviors are suggested to result from consumers' cognitive and affective states; consumers' perceived fairness and trust of the firm, for example, lead to customers experiencing greater value and manifesting more engagement behaviors (Roy et al., 2018). Understanding the relationship and the distinction between consumers' cognitive and affective states and their behaviors is therefore, not only important, but also necessary for firms looking to utilize engagement tactics to produce greater value. In other words, if a consumer has a positive attitude but never becomes either a customer or advocate, can positive value result for either the consumer or the firm? Consequently, the theory on customer engagement must address not only what engagement is, but what engagement is not.

ACADEMIC PERSPECTIVES ON CONSUMER ENGAGEMENT

There are many differing perspectives in the academic literature on what engagement is and how it should be measured. Some researchers argue that engagement is purely psychological, others argue that is behavioral, and most maintain that it is some combination of both. One of the earliest perspectives is that of Sprott et al. (2009), who developed and validated a scale proposed to measure engagement as a kind of self-brand connection or identification. Later, Brodie et al. (2011) would draw on relationship

marketing theory and service dominant logic to develop a set of five propositions and a general definition explaining the nature of and delineating the scope of customer engagement. They explore previous conceptions of engagement on the basis of their dimensionality, with the dimensions being emotional, cognitive, behavioral, or some combination of the three, and ultimately conclude customer engagement should conceptualized as a multidimensional construct composed of the three aforementioned dimensions. Hollebeek et al. (2014), would go on to develop and validate a scale purported to measure customer brand engagement on these same three dimensions (cognitive, emotional, and behavioral), and their work has since become one of the most widely cited conceptions of engagement, which they defined as "a customer's positively valenced brand-related cognitive, emotional, and behavioral activity during or related to focal consumer/brand interactions." Their findings, and those of others, indicate that these three dimensions positively influence self-brand connection and brand usage intent (Hollebeek et al., 2014; Harrigan et al., 2018); intention to "like" on social media (Halaszovich and Nel, 2017); brand equity (Hepola et al., 2017); and willingness to donate and word of mouth (Algharabat et al., 2018).

Some recent works on engagement have prioritized the focus on customer behavior. By focusing on specific customer behaviors, firms can make strategic decisions to motivate customers to take those particular actions. Pansari and Kumar (2017) for example propose that customer engagement is composed of direct (buying) and indirect (referring, influencing, and feedback) aspects. They subsequently develop a framework and set of thirteen propositions for understanding the relationship between these two aspects of engagement and other constructs such as emotions and satisfaction. Roy et al. (2018) develop a scale to measure engagement in the context of co-creation, utilizing the perspective of van Doorn et al. (2010), who propose the concept of customer engagement behaviors (CEB), defined as "customers' behavioral manifestations towards the brand or firm, beyond purchase resulting from motivational drivers." Roy et al. (2018) develop a scale to measure these behaviors under four categories: augmenting (such as creating content on social media in support of that organizations offering), co-developing (such as providing new product or service ideas), influencing (such as making recommendations to other potential customers), and mobilizing (such as teaching others about the firm's offerings or defending their reputations). Alternatively, Bruneau et al. (2018) develop a scale to measure engagement through six behavioral manifestations of loyalty programs: proactively using cards, redeeming points, adapting purchase behavior, being receptive to information, sharing information, and searching for information. Perhaps the most balanced and comprehensive view of engagement offered thus far is that of Alvarez-Milan et al. (2018) who develop a strategic customer engagement marketing decision framework composed of five facets: CE Conceptualization (which distinguishes between psychological and behavioral engagement), CE Target (which refers to who is engaged with the firm, either end users or other firms), CE Domain (which distinguishes between online and offline contexts), CE Experiential Routes (which distinguishes between firm controlled and customer controlled experiences), and finally CE Value (which demarcates the ways firms provide value to customers, either through direct contribution, such as a purchase, or indirect contribution, such as referring other customers).

More perspectives on engagement can be viewed in tables summarizing the literature published by various authors (Mollen and Wilson, 2011; Brodie et al, 2011; Hollebeek et al., 2014; Pansari and Kumar, 2017; Alvarez-Milan et al., 2018; Beckers et al., 2018).

Figure 1. A model describing the different types of engagement activities consumers can experience with retail brands. In this chapter we focus on firm-initiated engagement activities.
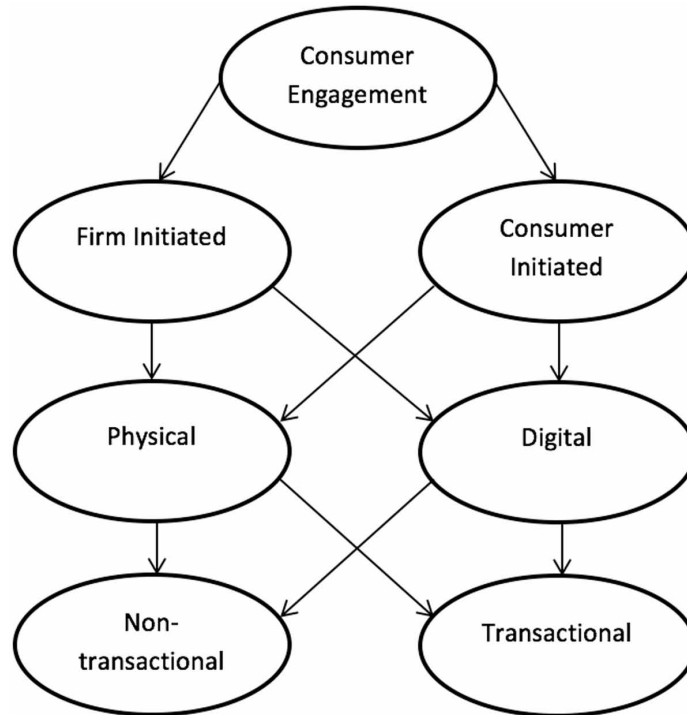
A CONCEPTUAL FRAMEWORK OF CONSUMER ENGAGEMENT

Frameworks for customer engagement need not focus so much on attitudinal consequences. Instead, the goal of creating customer engagement opportunities lies in motivating action. Figure 1 provides a conceptual framework of the different types of engagement activities firms can pursue.

We believe a framework focusing on retail brand activities may prove useful, because, the empirical engagement literature primarily focuses on the characteristics of engaged consumers (e.g., attitude, cognition, and behavior). However, what else is not clear is what types of activities can manifest customer engagement, positive or negative, or which firms should pursue which opportunities to engage customers. Recent research has shown that a firm's characteristics, such as reputation and the competitiveness of its industry, can be important determinants of the downstream consequences of engagement initiatives (Beckers et al., 2018). One may wonder why Microsoft sees it beneficial to run an active Twitter account with millions of followers, while Apple, aside from their separate customer service Twitter account, has never made a Tweet on their primary Twitter account. The goal of this chapter is to illustrate the different types of engagement activities firms choose to pursue. Our intention in doing so is to help pave the way for more empirical work that explores when and why engagement activities are more beneficial for some firms than for others.

Our framework proposes two distinct arenas where firms engage customers: (1) in the servicescape/physical environment and (2) digital contact online, including social media. Firms can engage with customers in the physical environment through characteristics of the retail environment or service providers.

Examples include the strong aroma of coffee in a coffee shop, service providers who great customers by name and invite conversation, free samples, or novel promotions for special times such as for Black Friday. An engaged customer is one who wishes to interact or involve themselves more with the firm somehow either in a positive or negative way. A firm can create more opportunities for this to happen by expanding its marketing activities to the digital space. Examples include creating a downloadable app, maintaining a Facebook presence, Twitter, or YouTube account.

In addition, as previously mentioned, we propose a few additional characteristics that can be used to identify different types of engagement activities. Engagement can be initiated by the firm, through a planned marketing effort, or by the customer due to some internal motivational state. Engagement can be transactional in the sense that it directly affects a firm's bottom line, or it can be non-transactional in the sense that there is the potential, but not guarantee, for it to indirectly affect a firm's bottom line downstream. Furthermore, any engagement activity can be spontaneous, for example customers organizing a boycott initiative, or a continuous and controlled effort, such a firm regularly sending out Tweets. This chapter focuses on illustrating firm initiated engagement activities with examples from two U.S. retail firms that constitute two of the world's largest retailers.

CASE STUDIES: WHY WALMART AND AMAZON?

The case studies that follow are of Walmart and Amazon. The ACSI provides customer satisfaction ratings across industries, which allows firms to compare their performance against competitors. As of 2017, Amazon scored 85 out of 100 ASCI points (ASCI, 2018a), while Walmart scored 71 out of 100 ASCI points (ASCI, 2018b). Amazon consistently has a significantly higher satisfaction rating than Walmart according the American Customer Satisfaction Index (ACSI) annual reports. In fact, Walmart regularly reports the lowest ACSI score among retailers in the index. We pick these companies to show that affect or satisfaction is not necessary for customer engagement, as theorized by many in the literature. The case study questions the huge amount of resources that many firms are spending on customer satisfaction campaigns because customer engagement does not follow satisfaction. Former American movie rental giant, Blockbuster, had very satisfied customers according to their reports, yet the company went bankrupt (Satell, 2014). This was clearly not due to a drop in the movie rental industry as can be seen from the success of online retailer Netflix. If satisfaction isn't the determining factor, then what is? What is it that Netflix, Amazon and Walmart do differently?

These firms make it easy for customers to engage with them period. "Why would I want to go out and rent a DVD when I can ask Alexa to play it?" Customers report not enjoying their Walmart shopping experience, yet they repeat the experience over and over again because they perceive it as a convenient way of restocking all manner of household goods. Utilitarian value drives the repeated patronage. Are we shifting from a hedonic value era to a utilitarian value era? Or, do customers want hedonic products in utilitarian ways? Customers do not just engage with firms in the physical retail space, but also online. This is facilitated by increase in internet speed, mobile devices, social media and technologies that make it possible to connect with the world around us from the convenience of our bedrooms or from tiny devices in our pockets. Western societies have a high productivity orientation and we are constantly trying to do more in less time. For most of us, our satisfaction with a retailer is not more valuable than our time.

The model in Figure 1 will be used as our basis for discussing two case studies, Walmart and Amazon, and how they engage with their customers. We believe customer engagement can either be Firm-

Initiated or Customer-Initiated. However, we focus on the Firm-Initiated side of the model because it has a more direct effect on firm performance and because it is under the direct control of the firm (See Fig 1). Amazon will serve as our online example, and Walmart as our physical example. However, we acknowledge that Walmart and Amazon are becoming more alike. Walmart is growing their online presence, and Amazon is growing its physical store presence. Therefore, all aspects of the model can be applied to either online or physical retailers.

WALMART ENGAGES

Walmart is an example of a successful retailer. Despite consistently low satisfaction ratings as reported by the American Customer Satisfaction Index (theacsi.org), Walmart continues to outperform other retail giants in sales and profitability, including Amazon's retail operations. Walmart's low-cost supply chain and customer engagement strategies contribute to the company's superior market performance. As shown in the model, firm-initiated engagement efforts can either be physical-transactional, physical-non-transactional, digital-transactional, and digital-non-transactional. Next, we will discuss examples of how Walmart uses each of these initiatives to engage with consumers.

Physical – Transactional

Physical - transactional engagement are initiatives with consumers outside the online environment (such as in the servicescape) that are intended to result in sales. One of the major ways Walmart engages with customers in store other than everyday purchases is their Black Friday Sales event. Walmart posted a 36-page ad in 2017 displaying items that will be on sale and the specific hours when customers can get those deals months before the event (Epstein, 2017). The features include many modern electronic devices available in *limited supply*. The flyer creates high anticipation for deals among shoppers, most of which one can only get in-store. Consumers actively respond to Walmart's black Friday event. Many go through the ads and figure out exactly what they want to buy on Black Friday and identify the closest store. Crowds of shoppers show up several hours before the sale begins and wait in long lines to purchase the desired items. Sometimes, shoppers get out of hand and fight over items with limited supply. The Walmart Black Friday Promotion obviously spikes sales and affects drives revenue performance. It is worth noting that the increases in sales do not always translate into increased loyalty. Many deal-prone customers borrow from future purchases by stocking up on on-sale items for future consumption.

Walmart also has loyalty programs that reward customers for their continuous patronage. The Walmart 3-2-2 Save rewards program allows holders of the Walmart Credit Card and Walmart Master Card to earn 3% back on purchases made on Walmart.com and the Walmart App, 2% back on purchases made at Walmart gas stations, and 1% back on all purchases made everywhere the Card is accepted such as Walmart stores, supercenters, neighborhood markets and Sam's Club (Walmart, 2016a). Walmart also offer coupons that allow holders to purchase items on a discount in store (https://corporate.walmart.com/policies). Walmart's neighborhood stores make it possible for customers to easily access their stores for shopping everyday grocery items.

Lastly, Walmart's no questions asked return policy is another way the retailer engages their customers in their stores. This policy allows shoppers to return purchased items at any store location for a full refund with or without a receipt within 90 days of purchase (https://corporate.walmart.com/policies). An

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entire department in their stores is dedicated to this service. This offers the opportunity for customers to engage with employees. This very effective return policy also makes customers more willing to shop and reduces their search for alternatives.

Physical – Non-Transactional

Physical – non-transactional engagement are attempts to engage with people in their community in a way that does not result in a direct sale. Walmart has numerous strategies to engage with consumers in a non-transactional way from getting involved in local community initiatives to nation-wide initiatives. Community initiatives include things like freebies at sporting events, working with local charities, and organizing events. In 2018, Walmart provided $5000 to a local special needs team in San Antonio after they learnt that $5000 worth of equipment had been stolen from the team. This was reported in the local news (KENS, 2018). Small initiatives like these are being used by firms to engage with their local communities worldwide.

In 2011, Walmart launched a Global Women's Economic Empowerment Initiative which works with leaders in government, non-governmental organizations, philanthropic groups, and academia to achieve 5 goals; increase sourcing for women-owned businesses, empower women on farms and in factories through training, market access and career opportunities, empower women through job training and education, increase gender diversity among suppliers, make significant philanthropic giving toward women's economic empowerment (Walmart, 2011). Walmart partners with non-profits such as The Orchid Society for empowering young African-American girls. In July 2018, Walmart brought girls from the Orchid Society to the Essence Festival in New Orleans (Walmart, 2018a). The Essence Festival is an annual music festival which started in 1995 to celebrate the 25th anniversary of Essence, a magazine aimed primarily at African-American women. Walmart is one of the sponsors of the event and partners with them to celebrate culture, music, empowerment and community. On a national scale, Walmart organizes Walmart Wellness Day annually. This is the largest health fair in the United States. It is a free event where families have access to health services such as immunizations, health screenings, and free OTC medicines and other stuff to get ready for the new school year. All these events, although non-transactional, help Walmart engage with their community and help consumers understand the values the company is built on. Companies engage in such non-transactional initiatives because it is believed that they have financial value downstream.

Digital – Transactional

Digital – transactional engagement are firm initiatives online that are intended to result in a sale. Walmart is aggressively improving their online engagement to compete with retail giant Amazon. Walmart has a comparative advantage in resources that they are leveraging to compete in the online space. Walmart already has an efficient and effective supply chain management system and over 11, 000 stores in 27 countries. This makes online shopping relatively easy. Customers can easily have items shipped to the nearest Walmart location and return items to the nearest location. However, the company is historically Brick and Mortar and will have to be very innovative to compete with historically online companies.

One area where the company is investing considerably is the technology to facilitate online shopping. Walmart recently joined forces with Google (the biggest internet search engine in the World). Google's online marketplace, Google Express helps retailers such as Costco and Target sell products

online. However, unlike these retailers, Walmart plans to use its own fulfillment and only leverage technological expertise of Google such as artificial intelligence and data analytics (Wakabayashi & Corkey, 2017). Already, customers can shop on Walmart.com, the company's online website and the Walmart app, which is available on IOS and Android. All these make a much larger supply of goods available to customers online than can be found in local stores. Customers even have the option to be alerted when an item is available online.

Items bought online can be shipped directly to customer's homes or any Walmart location of their choice. In 2016, Walmart launched ShippingPass, which is a $49/year shipping pass alternative to Amazon Prime ($99/year). Walmart later ended the ShippingPass program and replaced it with its current 2-day free shipping program, which is available for millions of Walmart products. They also reduced the minimum purchase requirement for free shipping from $50 to $35 and added an option for consumers to pick up in store if not eligible for free shipping (Walmart, 2017), facilitating membership-free online shopping with Walmart, and allowing engagement with a much larger number of consumers, many of whom are not willing to create accounts or join any membership program, much less pay for one. Walmart's credit card and master card also offer 3% cash back on online purchase made on Walmart.com or using the Walmart app. This is higher than most cards offer and encourages consumers to shop online.

Walmart has a program called Savings Catcher, which is a price match guarantee that allows customers to get the difference if an item purchased at Walmart is advertised at a lower price by a local competitor (https://savingscatcher.walmart.com/). However, the difference is issued on an eGift card which can only be used online with Walmart. This again is one of the strategies Walmart is using to get consumers shopping online. With partners such as google, there is so much potential for Digital engagement with retailers online. Google's voice ordering capabilities is only one ways Walmart could leverage this partnership to improve their online presence. In 2016, Walmart acquired Jet.com, which was one of the fastest growing e-commerce companies in the US to accelerate progress with Walmart.com and seamless online shopping (Walmart, 2016b).

Digital – Non-Transactional

Digital – non-transactional initiatives are firm initiatives online that are not intended to result in a direct purchase. Walmart engages consumers online through social media sites such as Facebook, Snapchat, Instagram, and YouTube. For example, Walmart's Facebook page is liked by over 34 million people as of July 2018. The company uses these channels to share their products and stories with consumers and employees. Walmart also frequently carries out campaigns on issues that are important to the company on social media. For example, as part of their "Fight Hunger Spark Change" campaign, the company provided 230 million meals for those in need through Feeding America (Walmart, 2018b). Walmart celebrates national holidays such as Father's Day, Thanksgiving, National Selfie Day, Best Friend day and much more by sharing inspiring stories on social media and inviting their community to get involved. The company also shares fun stories like dancing dinosaurs in their stores in support of the new 2018 Jurassic World Movie Premiere (Walmart, 2018c). Such initiatives not only engage consumers, but also stakeholders in the event, which can include employees from the firms involved (Viglia et al., 2018). For service employees, greater engagement with ones work was found to positively influence their performance (Menguc et al., 2013).

Social Media is a very powerful tool to reach millions of consumers today. This can be an effective way to bring about change, or at the very least inform consumers of the company's values. For example, on International Earth Day (the World's largest environmental movement), Walmart reported on Facebook that their one-year tree planting project had already helped reduce 20 million metric tons of carbon emissions (Walmart, 2018d). Increasingly, companies include a purchase button when they showcase their products on social media or a link to purchase the product. This increases the opportunity for customers to purchase their products or contribute to their campaigns. However, these types of engagement initiatives do not always have a direct effect on the company's performance. They demonstrate the brand's personality which has been suggested to positively influence brand love and, in turn, resulting in greater consumer brand equity (Macado et al., 2018). Ultimately, firms who create opportunities for their customers to interact with them or learn more about their activities and products through social media will build greater brand equity and customer loyalty, which are believed to have a positive effect on performance downstream.

AMAZON ENGAGES

Like Walmart (#1), Amazon (#2) is one of the world's retailing giants, despite operating largely, but not exclusively, in the digital space. Amazon achieves superior customer satisfaction ratings. According to the American Consumer Satisfaction Index, in 2017 Amazon achieved an index of 85 (ACSI, 2018a) while Walmart achieved an index of 71 (ACSI, 2018b). Not only that, but in 2017, Amazon was by far the largest online retailer in the United States in terms of net e-commerce sales ($52.8 billion), with Walmart in second position ($14 billion) (Statista, 2018). Amazon's superior ability to satisfy customers is no doubt largely due to their customer service strategies, which are ultimately focused on manifesting engagement as transactional behavior. Whether these strategies result in satisfied consumers or not depends on how well they can create a sense of value for consumers; after all, increased transactions result from increased value.

To achieve this goal, Amazon has created a general engagement strategy centered around three outcomes: activation, retention, and conversion (Amazon, 2018). This section will discuss examples of the firm initiatives undertaken by Amazon to create consumer engagement and how each of those initiatives tie into the three outcomes. Although Amazon is largely an online retailer, they have recently made bold inroads in the physical retail space as with the recent acquisition of Whole Foods Market (Petro, 2017), opening physical book stores (Duffer, 2017) and their own grocery stores (Stevens, 2018). Therefore, like the previous section, this case study explores engagement initiatives in both the physical and digital domains.

Digital – Transactional

Like Walmart and many other retailers, Amazon also has Black Friday and Cyber Monday sales, but, they also host their own special day known as Prime Day. Prime Day is sometimes referred to as "Black Friday in July" (the actual "Black Friday" is the last Friday in November and is the traditional start to the Christmas shopping season in North America) and it is a day where Amazon celebrates its Prime

members. Amazon Prime is a paid membership program that offers a host of benefits including free two-day shipping, exclusive access to Amazon pantry items, and early access to lightning deals. Lighting deals are daily timed sales of items made available at the sale price in limited quantities. The deals are available for all to watch 24 hours before they begin, but Prime members get 30 minutes of early access to these deals. On Prime Day, all lightning deals are exclusive to Prime Members and many expensive items that are not usually on sale, do go on sale, and in general the number of items on sale is much greater than usual. The exclusivity of deals and celebratory nature of prime day creates a greater sense of value for Prime members, thus increasing satisfaction and loyalty.

Amazon Prime, lightning deals, and Prime day all serve to achieve the three strategic outcomes of Amazon's general engagement strategy. Amazon Prime creates activation (likelihood that customers will use Amazon) by offering its members exclusive access to certain goods on Amazon and access to Amazon's other services, as well as free shipping on any order. Lightning deals create retention (likelihood that customers will return) due to the timed and limited nature of the sales, like Black Friday sales from other retailers. The anticipation of upcoming deals encourages customers to plan ahead and keeps them coming back to check what the latest deals are and when they will occur. On Prime day, deals are made exclusive to Prime members, thus increasing the sense of value Prime members experience and increasing the conversion rate (likelihood making a of purchase).

Prime day also represents an opportunity to get customers engaged with the Amazon App. This year Amazon offered several discounts gift credits to incentivize customers to use the app. Customers who never used the app before received a $10 credit on an order of more than $20 made through the app. Amazon offered customers $5 off select prime day deals when using the camera features within the app such as the AR view, product camera search, and barcode scanner. The credits Amazon offer serve as a vehicle to activate customers (use the app) and retain them (returning to the app) through notifications on deals and novel features like the AR product viewer. Ultimately getting customers to use the app increases the conversion rate and number of transactions customers make with Amazon.

Loyalty and membership programs like Amazon Prime ultimately serve the end of generating transactional behavior, which is what Amazon views as the primary desired outcome of consumer engagement. In general loyalty programs, over the long term, have been found to increase the amount of shopping "light shoppers" do at a retail outlet, increasing their purchase frequency and loyalty (Liu, 2007). While loyalty programs are generally free and offer cumulative rewards, Amazon Prime is a paid membership that does not directly offer cumulative rewards for making purchases. However, Prime members are given the option to select longer shipping for their purchases in exchange for credit that can go towards certain goods. So in a sense, Prime members can be rewarded when making purchases if they choose to be.

Prime members are also given the opportunity to apply for an Amazon Rewards Visa Credit Card. This card has no annual fee and gives 5% back in the form of points when shopping on Amazon and Whole Foods Market, while the member maintains a prime membership. The points can then be redeemed for cash, gift card, and travel vouchers after a certain threshold has been reached (2000 points) or be used at checkout for a discount when shopping at Amazon. Non-Prime members can use the Amazon Rewards Card too, but they only receive 3% back when shopping at Amazon and Whole Foods Market. All customer who use the rewards card receive 2% back when shopping at restaurants, gas stations, and drugstores, and 1% back elsewhere. Using this card offers a more direct option for customers to feel rewarded when shopping on Amazon, allowing a Prime membership to function more like a traditional loyalty program, thus increasing Amazon's customer retention and conversion rate.

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Digital – Non-Transactional

Activation and retention can be thought of as the non-transactional outcomes of Amazon's engagement strategy. Each product page allows buyers to leave reviews and ask questions about the product that can be answered by the manufacturer or other customers. After purchasing a product Amazon provides a button that customers can click to share their latest purchase on social media. Sharing on social media helps generate word of mouth for Amazon and thus increases the number of customers that will at least become activated (visit Amazon to view the product). Additionally, the Amazon app has novel features like the AR product viewer that customers may periodically use without necessarily making a purchase. Such features of the Amazon website and app help to engage customers with the Amazon brand. Q&A forums and the ability to comment on reviews and mark them as helpful or not allow customers to take part in the engagement process. Customers can also make public wish lists to share with other customers. Customer-to-customer interactions that take place within the Amazon ecosystem result in greater engagement with Amazon in general.

Amazon is also an effective user of social media. On Twitter for example, U.S. Amazon has made only a fraction of the number Tweets that Walmart has made (28,700 vs. 507,000), yet Amazon has accumulated more than three times as many followers (2.84 million vs. 925,000) (Twitter, 2018a, 2018b). Amazon joined Twitter only a few months later than Walmart (February, 2009 vs. November, 2008) and both also use a separate Twitter account to engage customers who need support (@Amazonhelp and @Walmarthelp). So, why the discrepancy?

A cursory browsing of both Twitter accounts reveals that, while both companies Tweet often about their products, services, and events, Amazon tends to share stories that provide insights about career advancement and entrepreneurship. Walmart on the other hand tends to share stories about the daily lives of their customers and employees. For example, Amazon recent shared a story about how having a hobby can foster creativity that can lead to more innovative business ideas for entrepreneurs, while Walmart recently shared a story about how a customer braved severe wind and rain to return a shopping cart to its rightful place in the parking lot. Both strategies serve the foster engagement, but Amazon's strategy may be more effective in terms of motivating Amazon's followers to share its Tweet, because their content often offers broadly applicable advice. On the other hand, the novel stories shared by Walmart, when once viewed, may be less likely to be revisited or shared. Another factor may also be that Amazon is not only a retail firm but a technology company with its foot in many industries, including web services.

Physical – Transactional

Amazon's extension into the physical retail space have afforded them the opportunity to experiment with unique engagement strategies that mix the digital world with the physical. Recently they opened the Amazon Go store in Seattle, Washington. Amazon Go is a grocery store without any checkout lines, offering the ultimate level of convenience in grocery shopping. Rather than having customers become more engaged with technology, Amazon Go aims to reduce the level of interaction with technology necessary for customers to experience as much as possible. To shop at the Amazon Go store, customer simply need to download and activate the Amazon Go app. Afterwards customers can put their phone away, enter the store, take what they like, and leave. Amazon keeps track of the products in its store using the latest technology in computer vision, sensor fusion, and deep learning. After customers are done

selecting the items they want they can just leave the store and a little while later their Amazon accounts will be charged for the products they left with.

It may seem counter intuitive to try to disengage the customer from the exchange process as much as possible, however, doing so allows for greater convenience, one of the strongest forces that drives consumers to a repeat shopping. Amazon also produces physical devices like the Dash button and Amazon Echo that customers can interact with through touch and voice, respectively, to purchase goods. Amazon's engagement strategy is clearly one that seeks to activate and engage customers through every possible avenue.

Physical – Non-Transactional

Amazon does not always try to completely remove the human element from the exchange process. For example, at the Amazon Go store, a team of associates is available at the store ready to assist customers. Rather than relying on technology, people can ask other associates for help. Perhaps human-to-human interaction creates stronger engagement than human-to- technology interactions. Recently Amazon hosted an Unboxing Prime Day music concert with performances by famous pop artists to celebrate Prime day. The event was live-streamed on twitch.tv, a streaming and chat platform acquired by Amazon in 2014 for $970 million in cash (MacMilian & Bensinger, 2014). An event like this concert, although facilitated by technology, is centered around human to human interactions, which can strongly motivate customers to visit (become activated) and use Amazon and its other services, like twitch.tv. Firms that involve themselves with their communities and society at large by participating in the real world stand to engage many consumers that they may not have otherwise reached. Livestreaming can be beneficial to small independent businesses and sellers too, resulting in increased trust in both the products and the sellers, ultimately resulting in more engaged customers, greater loyalty, and greater sales (Wongkitrungrueng and Assarut, 2018).

Alternatively, Amazon's Echo provides a voice activated A.I. assistant. Customers can use Alexa for many purposes such as to play music, make calls, set alarms and timers, ask questions about the weather and traffic, manage schedules and shopping lists, control other smart home devices, and even order pizza. Through this device Amazon can facilitate greater convenience in the lives of their customers. The convenience offered by Alexa allows customers to integrate it into their daily routine tasks, thus remaining engaged with Amazon throughout the day. Amazon demonstrates ways firms can attain high-level engagement without directly facilitating a transaction.

FUTURE RESEARCH DIRECTIONS

Where do loyalty, satisfaction, and convenience fit in the customer engagement process? Do all three go hand in hand and is the importance of each different for different types of firms? Are social media initiatives more likely to backfire than real world community initiatives, and which is a more effective driver of engagement and transactional behavior? For what type of firms, and when, are social media word of mouth engagement initiatives likely to backfire? And lastly, do customers feel more engaged with firms that they have strong social ties to, or firms that they perceive as offering the greatest level of automation and convenience? It seems reasonable to believe that if convenience was all that mattered that there would be no brand loyalty. As soon as a more efficient competitor comes along the customer

would move to them. Firms should ask themselves, then, in the long run, is it the engagement all that is important? Or, are actions that involve resources, like purchases, still the critical engagement? Despite the large number of published works on the topic of engagement, these key questions still remain unanswered.

CONCLUSION

Clearly, both Amazon and Walmart offer multiple opportunities for engagement. Who does a better job? If that question is gauged in terms of retail sales, the answer would be Walmart, as the company still produces the most revenue. However, the answer is less clear in terms of setting up an infrastructure that facilitates purchasing and creates switching costs associated with not being a customer.

The firm initiatives illustrated here demonstrate that successful engagement strategies are centered around motivating behavior, whether that be transactional, non-transactional, local or global. Firms can leverage the use of special events and limited time deals to encourage customers to plan in anticipation, which, in turn, motivates the customers to think about and do business with the firm. Loyalty and membership programs that make it easy for customers to be rewarded encourage them to become attached to the firm. Through participating in their local communities and hosting local community events firms can motivate consumers to participate in their communities, or act on important social causes, and to spread word of corporate responsibility by spreading word through social media. All such activities motivate customers to think, plan, and act with the firm in mind, which can lead to transactions downstream.

Retailers can choose to initiate engagement with consumers in either the physical or digital domains. Retailers can leverage their capabilities to increase the effectiveness of their strategy in the domain that is not their primary area of expertise. For example, Walmart allows customers to order items for pickup at a convenient Walmart store free of charge. Whether a firm primarily operates in the physical or digital space, social media can play an important role in any firm's overall engagement strategy. Social media helps firms connect customers with retail brands, deals, special events, and, perhaps most importantly, other customers and employees. Although technology is rapidly making the exchange process more efficient and automated, it is important to always keep a human element present, whether that be through the firm's employees or other customers. Convenience is king in the modern world but at times customers will require a personal touch and will even desire to socially engage with others. Firm's should strive to socially connect with their customers and communities to build strong, lasting relationships.

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Chapter 3
Engagement in a Third-Party-Managed Virtual Community and Its Effect on Customer Identification

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ABSTRACT

The chapter analyzes the components that generate users' engagement in a third-party-managed virtual community and these components' contribution to building user identification with the community. When this chapter distinguish between users who share their comments in multiple service categories to users who share comments in only one or two service categories, it is found that enjoyment benefits and participation in co-innovation increase identification with the community for both groups. The two groups differ, however, in that learning benefits improve identification with the community for participants who share comments on three or more services but not for participants who share comments on fewer services. The latter group's identification is, however, influenced by social benefits, functional benefits, and advocacy, feedback, and help to others.

INTRODUCTION

The advent of Internet has enabled a new age of interaction and substantially influenced traditional lifestyles. Individuals' new forms of communication and consumption through Internet have dramatically changed companies' marketing practices, which face increasingly competitive global contexts with more

sophisticated consumers and a growing need for greater efficiency and customer satisfaction—that is, more complex business environments. Internet users currently favor dynamic informative websites on which to express their beliefs and comment on services or products, among other behaviors. Technology provides increased opportunities for retailers to engage with their customers outside service encounters through non-transactional customer activities such as writing reviews, joining virtual communities, blogging, and similar activities collectively termed customer engagement (CE) behavior (Van Doorn et al., 2010). Recent academic research highlights the significance of these beyond-purchase interactions (Verhoef, Reinartz & Krafft, 2010). Furthermore, the Marketing Science Institute 2018-2020 research priorities indicate that it is crucial to understand the process by which customers become engaged in these non-transactional activities, as such activities are increasingly seen as a route to creating, building, and enhancing customer-firm relationships.

Despite consensus that virtual environments constitute ideal ecosystems in which to develop engagement processes, study of these environments is quite recent and requires more in-depth analysis (Merz, Zarantonello & Grappi, 2018). As Claffey and Brady (2017) indicate, different types of virtual environments exist (for example, member-initiated, firm-hosted, and third-party-managed virtual communities, social networks, etc.). Further, each of these virtual contexts is developed to achieve different goals. For example, virtual communities facilitate exchange of products, services, and information (e.g., eBay, TripAdvisor); social networks managed by brands and virtual brand communities seek to involve their customers in various co-creation activities, such as product design, product testing, and relationship building. Given the specific characteristics of different virtual environments, deeper analysis is required of the models of engagement that occur in each type (Claffey & Brady, 2017).

Some research has investigated the definition of engagement as a complex process and its measurement through multidimensional scales (see Table 1), but the study of engagement in third-party-managed virtual communities is underdeveloped compared to other types of virtual contexts (Agag & El-Masry, 2016). A third-party-managed virtual community encourages service exchanges within the ecosystem of all actors (consumers, potential consumers, various service firms housed on the platform, and managers of the website itself) (Vargo & Lusch, 2016). From this perspective, it is unclear how users perceive engagement and how such engagement can be assessed.

On the other hand, companies that can exploit information and communication technologies—specifically by gaining maximum advantage from third-party-managed virtual communities to encourage customer engagement—will ensure their survival and improve their firms' business results. Prior research on CE has focused primarily on detecting the results of such engagement. Consequences analyzed include the influence of CE on brand equity, brand loyalty, and self-brand connection (Hollebeek, Glynn & Brodie, 2014; So, King, Sparks & Wang, 2016), but no empirical research to date has examined the role of CE in enhancing the customer's identification with the third-party-managed virtual community.

This study's first contribution is thus to identify 1) the dimensions that constitute users' engagement in a third-party-managed virtual community and 2) the influence of users' engagement on users' virtual community identification. For the empirical analysis, we use a third-party-managed virtual community of travelers. This type of third-party virtual community is of great interest because it has revolutionized the travel industry and the traveler's behavior (Casaló, Flavián & Guinaliú, 2012). For example, TripAdvisor, an important virtual community of travelers, totals 455 million users per month and over 600 million comments (TripAdvisor, 2017), making it a very illustrative example of the power of digital platforms to generate engagement (reading comments, consulting photos, comparing prices, etc.) and to influence users' decision-making process. According to one study, 69% of Spanish travelers consult

TripAdvisor before making a decision to buy, followed by Booking.com (45%), Trivago (28%), Hotels. com (23%), and Expedia (22%).

The model of engagement in third-party-managed virtual communities, and more specifically in virtual communities of travelers, enables us to answer the following questions: How do the participants in these platforms perceive engagement? What dimensions make up participants' engagement? What are the engagement behaviors? What influence does participants' engagement have on users' virtual community identification?

Answering these questions is very important for management, as it will help managers of third-party-managed virtual communities to identify and focus their marketing efforts on the dimensions that stimulate engagement behaviors. The long-term survival and value of the virtual community, as well as the results for firms housed in the community, depend greatly on a satisfactory engagement process.

BACKGROUND

Literature on Engagement

Table 1 synthesizes the definitions and dimensions of engagement identified in virtual environments.

We can draw significant conclusions from Table 1. On the one hand, specific virtual environments are distinguished by different engagement. Despite the divergence of criteria, however, most of the studies include community engagement as the user's motivation to interact and cooperate with community members (Algesheimer, Dholakia & Herrmann, 2005). Further, the most recent studies (Oliveira, Huertas & Lin, 2016) incorporate not only motivations but also behavioral intention aspects of CE in the concept of engagement.

Along the lines of Dessart, Veloutsou and Morgan-Thomas (2016) and Oliveira, Huertas and Lin (2016), this study synthesizes the following different aspects of the engagement that occurs in a third-party-managed virtual community: 1) one aspect determined by use of the community to search for information (for example, to plan a trip or make a reservation), 2) a second aspect of engagement derived from the participants' motivations, that is, learning value, enjoyment value, social value, and functional value, and 3) a third aspect of engagement, defined through interaction with other users of the virtual community—creating content, generating feedback, and helping others (e.g., giving an opinion about a specific hotel or restaurant); and carrying out co-innovation activities with both suppliers of the services housed in the virtual community (e.g., proposing a new modes of service for a hotel or restaurant) and the platform itself (e.g., proposing a new forum, interface to simplify the community's website, mobile app, etc.).

In relation to interaction with other users of the virtual community, we should stress that engagement depends on specific virtual environments. For example, video watching, video commenting, video producing, and video sharing are engagement aspects specific to video sharing communities (i.e., Hu et al., 2016). Creating groups and/or events, participating in them, sending and answering invitations to friends, and visiting other users' profiles are behaviors characteristic of social networks (Chen et al., 2014).

Along the lines of Vernette & Hamdi-Kidar (2013), this study synthesizes the engagement that occur in a third-party managed virtual community into three levels: 1) a low level of engagement, determined by use of the community to search for information (for example, to plan a trip or make a reservation), 2) a moderate level of engagement, defined through interaction with other users of the virtual community,

Table 1. Existing scales that measure consumer engagement in online contexts

DEFINITION	DIMENSIONS	FOCUS
Simon & Tossan (2018) define engagement as users' continued interaction with a brand network site.	3 dimensions: creating, consuming, and contributing	Brand network site (Facebook page)
Fang, Zhao, Wen & Wang (2017) define psychological engagement as the level of an app user's positive, fulfilling, and app-related state of mind, which is characterized by vigor, dedication, and absorption. Behavioral engagement is defined as users' continued interaction with a mobile application	1 dimension for psychological engagement and 1 dimension for behavioral engagement	Mobile application
Dessart, Veloutsou & Morgan-Thomas (2016) define engagement as the state that reflects consumers' individual disposition toward engagement foci, which are context-specific. Engagement is expressed through varying levels of affective, cognitive, and behavioral manifestations that go beyond exchange situations.	3 dimensions and 7 subdimensions: affective (enthusiasm and enjoyment), cognitive (attention and absorption), and behavioral (sharing, learning, and endorsing)	Brand network site (Facebook page)
Oliveira, Huertas & Lin (2016) study the behavioral intention aspect of user engagement to examine users' intentions to become involved in participation and the socialization experience in social networks.	3 dimensions of social influence: subjective norm, group norm, social identity; 5 dimensions of use and gratification: purposive value, self-discovery, maintaining interpersonal interconnectivity, social enhancement and enjoyment; and 1 dimension of social presence: social presence	Brand network site (Facebook page)
Baldus, Voorhees & Calantone (2015) analyze compelling, intrinsic motivations to continue interacting with an online brand community.	10 dimensions: brand influence, brand passion, connecting, helping, like-minded discussion, hedonic rewards, utilitarian rewards, seeking assistance, self-expression, up-to-date information	Virtual brand community
Verhagen, Swen, Feldberg & Merikivi (2015) draw on uses and gratifications theory to identify motivations to continue interacting with a company-hosted electronic platform.	4 dimensions: cognitive benefits, social integrative benefits, personal integrative benefits, hedonic benefits	Company-hosted electronic platform
Calder, Malthouse & Schaedel (2009) define consumer engagement as "a collection of experiences" (consumer's beliefs about how a site fits into his/her life).	8 dimensions: stimulation and inspiration, social facilitation, temporal, self-esteem and civic mindedness, intrinsic enjoyment, utilitarian, participation, and socializing and community	Website

Source: Own elaboration.

creating content and generating feedback (e.g., giving an opinion about a specific hotel or restaurant), and finally 3) a high level of engagement, in which participants carry out co-innovation activities with both suppliers of the services housed in the virtual community (e.g., proposing a new modes of service for a hotel or restaurant) and the platform itself (e.g., proposing a new forum, new interface to simplify the community's website, or mobile app, etc.).

Virtual Community Identification

Identification is the degree to which community members perceive that they and their community share the same defining attributes (Ahearne, Bhattacharya & Gruen, 2005). According to social exchange theory, perceived benefits are pivotal factors that ensure identification because individuals who perceive moral obligation repay the benefits to the other party (Jin, Park & Kim, 2010). In online community contexts, increasing benefits (i.e., functional, learning, hedonic, and social benefits), should increase community identification because the community serves both as a means to fulfill personal and social needs, and as a place for enjoyment (Bagozzi & Dholakia, 2006; Gupta & Kim, 2007; Kuo & Feng,

2013). In sum, community identification emerges naturally when members can benefit from a relationship with the community.

Previous research on Internet-based communities has found that members establish shared connections and a collective identity, even in communities with a lack of social interaction among members. Through interacting with others in the virtual community and conforming to group norms with regards to their consumption habits, individuals satisfy their own intrinsic utilitarian (e.g., finding information) and hedonic (e.g., experiencing sensory pleasure) consumption goals, while also integrating the community as part of their identity. Individuals who engage strongly with virtual communities also develop stronger community trust, are more easily persuaded by messages in the community, and are more likely to share messages with others. Additionally, users who are more engaged with communities are more likely to follow the community rules, participate in coomunity-related activities, and exhibit higher community loyalty over a longer period of time. Moreover, when consumers are highly committed to a community, they are more likely to purchase the community's products or services. Members with higher engagement level also visit the community more regularly, actively upload content, spread eWoM, and stay on as community "followers" for a longer period of time (Phua et al., 2017).

On the other hand, Bhattacharya and Sen (2003) suggest that identification is more likely to occur when consumers participate frequently in group activities and interact with other members. In their studies of community behavior, Algesheimer, Dholakia Herrmann (2005) and Tsai and Pai (2013) find that participation in community activities significantly increases consumers' attachment to the community. Consumers with high levels of interaction (feedback, helping others) also have direct access to other community members. Frequent participation in community activities makes consumers feel more like "insiders," increasing the likelihood that the community will become a viable social category capable of shaping their social identity (Bergami & Bagozzi, 2000). This study thus proposes that:

Hypothesis One (P$_1$): The user's engagement positively influences user-community identification in a third-party-managed virtual community.

EMPIRICAL ANALYSIS

Methodology

To tackle the research goals proposed, we perform an empirical study of a sample of 600 users of TripAdvisor in Spain who stated that they share their service experiences through the platform. The information was obtained by telephone survey in 2016. The respondents share comments in any of the four categories of experiences: hotels, restaurants, flights, and/or vacational renting (for example, apartments), which are present in TripAdvisor. A randomized stratified sample by means of simple allocation was used to adapt the response percentage for each of the experiences according to the real number of comments in TripAdvisor. The products and services housed on the platform (lodging, restaurants, etc.) encourage analysis of engagement because users show high involvement in and personalization of the service experience (for example, preparing a trip).

As to the sample profile, 45.2% of the survey respondents commented 50% or more of the times they used the platform. The highest percentage of users (74.2% of the sample) used the platform to comment

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on hotels, followed by 49.5% who used it to comment on their experiences at restaurants. Slightly over a third also used the platform to comment on flights and vacation rentals.

By gender, 49.7% of the survey respondents were men and 50.3% women. The age distribution was as follows: 17.7% under 25 years of age, 29% ages 26-35, 37.2% ages 36-50, 12.2% ages 51-65, and 4% over 65. By education level, 10.8% of the participants had completed primary school, 39.3% secondary school, and 49.5% university. By family income, 11.2% of the participants had an income of at least 1000 euros/month, 51.8% 1000-2000 euros, 29.7% 2001-3000 euros, and 6.8% over 3000 euros. The participants were primarily members of two- or three-member households (61.2%); 41% did not have children, 23.3% had one child, and 19.5% had two children.

The items used to measure the concepts were obtained by adapting scales employed previously in the academic literature. First, the concepts of information searching, learning benefits, and functional benefits were measured by adapting the scales from Nambisan and Baron (2009) and Kuo and Feng (2013). Enjoyment benefits and social benefits were measured by adapting the scale from Zhang, Guo, Hu and Liu (2017). Second, to evaluate engagement behavior, community participation through advocacy, feedback, and help to others was measured by adapting the items used in Yi and Gong (2013). Co-innovation was measured by adapting the scale developed by Tonteri et al. (2011), and community identification by adapting the scale from Ahearne, Bhattacharya, and Gruen (2005).

All items were measured using 11-point Likert scales from 0 (disagree completely) to 10 (agree completely).

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Table 2 shows that 45.2% of the sample commented at least 50% of the times they used the platform.

Users in the sample used the platform most often (74.2%) to comment on hotels, followed by 49.5% to comment on their experiences at restaurants. Slightly over a third also used the platform to comment on their flights and vacation rentals (Table 3).

Table 4 shows that participants who commented on only one or two services (including any of the services available) primarily used the virtual community's webpage (51.5%). Only 12.6% of participants who commented on only one or two services did so, however, through the mobile application. The results for range of service categories commented on (one or two vs. three or more service categories) and par-

Table 2. Distribution of the sample by frequency with which user used the platform to make comments

Occasions	Absolute Frequency	Relative Frequency Percentage
Always	24	4.0
75%-99%	63	10.5
50%-74%	185	30.8
25%-49%	154	25.7
Less than 25%	174	29.0
Total	600	100.0

Source: Own elaboration.

Table 3. Distribution of comments by service

Service Category	Absolute Frequency	Relative Frequency Percentage
Hotels	445	74.2
Restaurants	297	49.5
Flights	226	37.7
Vacation rental	207	34.5

Source: Own elaboration.

Table 4. Relationship between type of connection to the virtual community and range of service categories commented on

Range of Service Categories Commented on	Mobile App.	Web	Both	Total	χ2
One or two categories (N)	56	228	159	443	19.8***
One or two categories (%)	70.0%	82.3%	65.4%	73.8%	
Three or more categories (N)	24	49	84	157	
Three or more categories (%)	30.0%	17.7%	34.6%	26.2%	
Total (N)	80	277	243	600	

Source: Own elaboration.

ticipant's type of connection indicate a clear relationship between the two variables. The percentage of users who commented on one or two services and who used the webpage for their comments accounted for 87.4% of all users/comments. The reverse occurred for the subsample of users who commented on three or more service categories; 53.5% used both the webpage and the mobile app. Those who used only the webpage to comment constituted 31.2%, and a slightly higher percentage of this subsample used only the mobile app.

Table 5 shows the relationship between frequency of commenting (low frequency indicates commenting on fewer than 50% of occasions, and high frequency commenting on 50% or more of occasions) to type of connection to the virtual community. The results indicate that most participants with low comment frequency accessed the community primarily through the webpage (50.9%). Few low-frequency participants used only the mobile app, however (11.6%). In contrast, most participants who comment frequently stated that they use both the webpage and the mobile app. (44.1%).

In this section, we analyze the results obtained in the exploratory research on virtual community users' perception of their engagement, taking into account the different dimensions of engagement identified in the literature on the topic (see Table 1). Users' perceptions of their engagement relative to the virtual community are analyzed for the entire sample, differentiating between subjects who comment on one or two service categories (low range of use) and subjects who comment on three or more categories (high range of use), since the number of service categories on which the participants comment may be a moderating variable indicative of intensity, experience, and involvement in use of the platform.

First, as to use of the virtual community, Table 6 shows that TripAdvisor users generally employ the platform to a considerable extent for information searching and follow the advice they find there.

Table 5. Relationship between type of connection to the virtual community and frequency of making comments

Frequency of Comments	Mobile App.	Web	Both	Total	χ2
Low frequency (N)	38	167	123	328	6.8**
Low frequency (%)	47.5%	60.3%	50.6%	54.7%	
High frequency (N)	42	110	120	272	
High frequency (%)	52.5%	39.7%	49.4%	45.3%	
Total (N)	80	277	243	600	

Source: Own elaboration.

However, 1) information searching with extra effort (for example, contacting other users to request more information) and 2) incorporating value (rating the utility of the information given by other users) are much lower in the case of participants with a low frequency of platform use, since these are the greatest differences in the two variables between participants with high vs. low frequency of use.

TripAdvisor users share comments motivated by different benefits, including learning benefits, enjoyment benefits, social benefits, and functional benefits in terms of personalization.

As to learning benefits (see Table 7), all variables take considerable and similar values. Learning about brands and the value of the service are slightly more prominent than the other variables, however, and users share fewer comments to learn about new features of the services. In all aspects of learning, high-range users' of TripAdvisor show statistically higher scores than users with a low range of comments. Among the users who comment on the platform, those who comment on more categories score higher than 7 in all aspects of learning. Those who comment on more service categories are more interested in knowing about the brands of the service, and those who comment on fewer categories more interested in having their questions answered.

As to the enjoyment benefits individuals experience from engagement with the virtual community, the results show that TripAdvisor obtains moderate values for entertaining and amusing its users (see Table 8). Participants who comment on few service categories rate these variables below 7—an area in need of improvement. By comparison, participants who comment on a wider range of service categories

Table 6. Average levels of information searching based on range of use

On TripAdvisor,	Low Range of Use	High Range of Use	F (p)
I search for information in comments by other users	8.05	8.34	3.61 (0.058)
I take others' comments into account to improve my experience	7.89	8.21	4.73 (0.030)
I consult the forum of opinions available	7.00	8.04	28.47 (0.000)
if I need information, I contact other users	5.10	7.20	63.24 (0.000)
I rate the utility of the information given by other users	6.10	7.48	40.35 (0.000)
I trust other users' advice about the services	7.26	7.90	19.31 (0.000)
I follow other users' advice about the services	7.23	7.78	14.71 (0.000)

Source: Own elaboration.

Table 7. Average levels of learning benefits based on range of use

Sharing Comments on TripAdvisor Serves to:	Low Range	High Range	F (p)
know the services better	7.04	7.61	11.88 (0.001)
receive answers to questions about use	7.08	7.45	6.31 (0.012)
learn about new features	6.88	7.65	20.58 (0.000)
get to know the companies	6.98	7.61	14.89 (0.000)
get to know the brands	7.14	7.67	11.11 (0.001)

Source: Own elaboration.

Table 8. Average levels for enjoyment benefits based on range of use

Participating on TripAdvisor:	Low Range	High Range	F (p)
Entertains me	6.74	7.57	21.16 (0.000)
Relaxes me	5.45	6.47	24.16 (0.000)
Amuses me	6.33	7.32	28.38 (0.000)

Source: Own elaboration.

rated this dimension significantly higher, around 7.5 points. As to the type of enjoyment, users connect to TripAdvisor more to amuse themselves and to be entertained than to relax.

As to the social benefits associated with individuals' engagement in the virtual community (see Table 9), the results indicate that users do not perceive TripAdvisor as a useful virtual community for increasing their affinity, friendship, integration, and social relationships with other participants on the platform. Participants who comment on few service categories rate these variables lower than 5 points. Participants who comment on a greater number of service categories score this dimension significantly higher. This finding does not imply, however, that the latter subsample's ratings are high; they hardly reach 6 points.

Further, when users of virtual communities seek and share information, they obtain functional value in terms of personalization. As Table 10 shows, TripAdvisor's users give variables such as planning personalized service experiences and finding services that fit their interests scores above 7, nearly 8. Most of the ratings are significantly higher in the case of users who comment on more service categories, but users who comment on both low and high ranges of categories have similar perceptions of the extent to which they find services that fit their interests.

Table 9. Average levels of social benefits based on range of use

Sharing Comments on TripAdvisor Is Useful for:	Low Range	High Range	F (p)
Expanding my social network	4.76	5.92	22.91 (0.000)
Increasing my affinity with the community of users	4.83	6.05	30.36 (0.000)
Increasing my feeling of belonging to the community	4.68	5.85	25.11 (0.000)

Source: Own elaboration.

Table 10. Average levels of functional benefits based on range of use

Sharing Comments on TripAdvisor Allows Me to	Low Range	High Range	F (p)
Plan a personalized service experience	7.57	7.95	7.23 (0.007)
Find services that fit my interests	7.74	7.65	0.50 (n.s.)
Choose the service I need	7.53	7.84	5.35 (0.021)
Save my favorite services	7.10	7.45	4.87 (0.028)

Source: Own elaboration.

As to participation on the platform with the goal of advocacy, giving feedback, or helping others (see Table 11), TripAdvisor users who comment on more categories assign statistically higher scores to all variables except advocacy than do users who comment on a lower range of categories. Among users who comment on TripAdvisor, those who comment on a greater range of categories assign scores of approximately (and just above) 7 points. Saying positive things about the service and encouraging other users to use the service when they have liked it constitute the most common type of participation among users who comment on both more and fewer service categories. However, informing of service failures and making suggestions to improve and help other participants answer their questions scores lower than 6.70 among participants who comment on a low range of services and higher than 6.70 among participants who comment on a high range of services.

TripAdvisor users employ the platform less to share comments than to search for information. It is worth noting that more comments are shared when users experience problems, a situation that scores one point higher than the score for situations in which the comment seeks to help other users. Complaint is thus a more intense motivation than philanthropy. Since participants make extensive use of the comments, however, they also dedicate these comments to a considerable extent to helping other users and to sharing their good ideas; items on this type of activity score high in this subsample.

Table 11. Average levels of advocacy, feedback, and help to others on TripAdvisor based on range of use

When I Give TRIPADVISOR an Opinion About a Service:	Low Range	High Range	F (p)
If I liked it, I say positive things about it	7.55	7.93	4.49 (0.035)
If I liked it, I recommend it	7.51	7.76	2.06 (0.152)
If I liked it, I encourage others to use it	6.95	7.50	8.72 (0.003)
If I have a good idea about how to improve the service, I include the idea	6.20	7.17	22.70 (0.000)
When I have had a problem with the service, I make it known	6.67	7.63	20.54 (0.000)
When I have had a problem with the service, I give ideas on how to solve the problem	5.91	6.94	22.37 (0.000)
I give advice that is useful for other users	6.02	7.04	24.21 (0.000)
I teach other users how to choose the service better	5.59	6.76	26.88 (0.000)
I help other users who ask me for advice	6.40	7.13	15.20 (0.000)
Sample size 600	443	157	-

Source: Own elaboration.

Finally, the highest level of engagement that can be found in a virtual community involves users' participation in co-innovation activities. Since TripAdvisor is a virtual community where different parties interact—the service firms housed on the platform, potential customers, customers, and managers of the platform itself—the possibility of participating in co-innovation activities on TripAdvisor is highly varied and may be twofold. Platform members may either co-innovate with the different services housed on the platform (see Table 12) or improve the platform itself (see Table 13).

As to co-innovation to improve the services housed on the virtual platform, users who comment on more services score around 6.5, significantly higher than members who comment on fewer services, who score below 5.5.

Users who comment on fewer service categories when they co-innovate focus on proposing ways to improve the services, whereas users who comment on more categories primarily identify new service trends. Concerning co-innovation for the platform, both subsamples address their comments to improving its informational content. Finally, both groups tend to be more willing to address co-innovation activities to the website (content, ease of use) than to the firms supplying the services.

Although not considered as a manifestation of engagement in this study, platform users' level of involvement in some phases of performing the service (for example, in planning a trip) is closely linked to engagement. This activity is called co-production. Again, Table 14 shows that TripAdvisor users who comment on a greater range of service categories participate more actively in organization of the services, invest more time, use their ideas more, etc. The results show no significant differences between the two subsamples regarding use of previous experience to participate in organizing a specific service.

Table 12. Average levels of co-innovation with service firms on TripAdvisor based on range of use

In What Way Do You Collaborate With the Firms About Which You Have Expressed Opinions on TripAdvisor:	Low Range	High Range	F (p)
Proposing new modes of service	5.39	6.49	26.33 (0.000)
Proposing ways to improve existing services	5.60	6.46	16.91 (0.000)
Proposing ideas to identify new users	5.10	6.40	34.69 (0.000)
Identifying new trends	5.31	6.65	39.05 (0.000)

Source: Own elaboration.

Table 13. Average levels of co-innovation with TripAdvisor platform based on range of use

In What Way Do You Collaborate With TripAdvisor to Improve the Platform?	Low Range	High Range	F (p)
Its informational content	6.26	7.36	29.04 (0.000)
Its aesthetics	5.82	6.62	16.99 (0.000)
Ease of use	6.16	7.22	28.15 (0.000)
Navigation speed	5.81	7.14	39.50 (0.000)

Source: Own elaboration.

Table 14. Average levels of service co-production based on range of use

In the Service Experiences on Which You Commented on TripAdvisor:	Low Range	High Range	F (p)
You participated actively in organizing the experiences	6.06	6.64	5.77 (0.017)
You used your prior experience to organize the experiences	6.35	6.50	0.49 (0.483)
You used your own ideas to organize them	6.26	6.64	2.99 (0.084)
You invested time in organizing them	5.86	6.68	13.63 (0.000)

Source: Own elaboration.

ANALYSIS OF THE EFFECT OF ENGAGEMENT ON USERS' IDENTIFICATION WITH THE VIRTUAL COMMUNITY

To analyze the effect of engagement on participants' identification with the virtual community, we opted for a regression analysis with maximum likelihood estimation (MVL). The results are presented in Table 15.

Table 15 analyzes the relationship of dependence between engagement and identification for users who comment on both low and high ranges of service categories. The dependent variable is an average composed of three items drawn from a scale to measure identification previously validated in the literature. The independent variables are those included in exploratory analysis in the previous point. We created average variables from the items that composed each of the variables in the previous point, and these averages constitute the antecedents of identification.

For the subsample of participants in the virtual community who comment on a lower range of service categories, the estimated model explains 50% of the variance observed in the variable identification with the virtual community. For participants who comment on a higher range of service categories, the model explains 56.4%. The model thus fits reality well, slightly better for the high-range group. The model explains a high percentage of the variance observed in the data.

The results show a strong and significant relationship between enjoyment benefits and identification with the virtual community: a standardized coefficient of 0.48 for participants who comment on more service categories and of 0.26 for participants who comment on fewer service categories. Although both values are high, the higher value for participants who comment on more categories implies that amusement and entertainment create greater identification with the virtual community among participants who comment on various service categories.

Similarly, the results confirm the positive and significant effect that the personalized functional value, social value, and participation in the virtual community through advocacy, giving feedback, and helping other users of the virtual platform exert on identification in the group of participants who comment on fewer service categories only. While these effects are not found for the group of participants who comment on more service categories, the latter group's identification with the virtual community is positively influenced by information searching. Finally, for both groups, participation in co-innovation activities has a positive and significant influence on identification with the community, and this influence is considerably higher among participants who comment on more service categories.

It is important highlight two strengths of this research in relation to previous studies: 1) this study synthesizes the engagement that occur in a third-party managed virtual community into different levels,

Table 15. Effect of engagement on user's identification with the virtual community

	LOWER RANGE OF COMMENTS (Standardized Coefficient)	LOWER RANGE OF COMMENTS (T-Student)	HIGHER RANGE OF COMMENTS (Standardized Coefficient)	HIGHER RANGE OF COMMENTS (T-Student)
Information searching	0.12	0.83 (n.s.)	-0.23	-1.40 (n.s.)
Learning benefits	-0.17	-1.16 (n.s.)	0.41	1.94**
Enjoyment benefits	0.26	5.12***	0.48	5.78***
Social benefits	0.23	4.33***	-0.07	-0.88 (n.s.)
Functional benefits	0.22	5.56***	-0.10	-1.53 (n.s.)
Advocacy, feedback, and help to others	0.15	3.19 ***	0.1	1.22 (n.s.)
Co-innovation	0.10	1.98**	0.29	3.86***
Snedecor's F	44.41***	44.41***	22.79***	22.79***
Adjusted R^2	0.50	0.50	0.56	0.56

Note: *** p=0.001, ** p=0.05, *p=0.10, n.s: non-significant

Source: Own elaboration.

and relates these levels with users identification, and 2) this study shows different relationships for various groups of community members according to the number of service categories that they comment. As a weaknesses of the study, we could enrich the proposed modeling through a model of structural equations.

SOLUTIONS AND RECOMMENDATIONS

The results of this study contribute practical implications relevant to two parties: managers of virtual communities of travelers and those in charge of the companies/brands about which the comments are made. It is very important that both groups understand the factors that contribute to both increasing community users' engagement and detecting the levels of participation in the community relative to information searching, generation and transmission of feedback, and intent to participate in co-innovation activities. Such understanding enables managers to establish strategies and action plans that foster these behaviors.

We thus recommend establishing strategic plans based on knowledge of the aspects of engagement that increase community identification among the different groups of participants. For example, for participants who comment on a lower range of service categories (on one or two—for example, who comment only on hotels, or only on restaurants), managers should ensure that the platform enables high personalization of their service experiences to strengthen their identification with the virtual community, since personalization is an aspect of engagement that greatly influences identification for this group. Virtual communities for users with a low range of comments should thus have clear, simple filters that enable them to plan experiences that fit their interests very closely. The possibility of personalizing the service experience does not, in contrast, contribute to increasing identification with the community among users who comment on a wider range of services. For this group, learning benefits are an important antecedent of identification with the community. Creating a section of the platform for these users with new items related to services, brands, etc. through which they can increase their knowledge of services that interest them will thus have positive repercussions for their identification with the community (for example, one could inform such users of the opening of a restaurant near them).

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We also identify areas for improvement in the variables composing participants' engagement and concentrate resources on developing specific dimensions of this engagement—for example, improving the average values of enjoyment benefits, since this dimension has a significant positive influence on users' identification with the community. Managers should also take care to strengthen social benefits, particularly for users who comment on a lower range of services, since social benefits increase this group's identification with the virtual community. To achieve these improvements, managers could increase visibility of topical forums within the online community (e.g., trips with children, pets, etc.), as well as of forums not directly related to these topics but encouraging exchange of experiences (e.g., forums on gastronomy, leisure, etc.). Such actions could be especially beneficial for increasing ties and affinity with other individuals in the group and enabling users to have an enjoyable, entertaining time when they visit the platform, thus contributing to their increased identification with it. We therefore recommend that managers of virtual communities insist in their commercial communication (advertising) on the great possibility for enjoyment that this type of platform provides. To date, at least in Spain, advertising on virtual communities like TripAdvisor has focused more on functional aspects of the platform (possibility of accessing more information on hotels, comparing prices, etc.). According to the results obtained here, however, information-based benefits do not contribute to increasing identification with the community among users who share comments on fewer service categories.

Finally, we recommend maximizing interactivity within the community and making participants feel heard, that is, responding to them and making them feel that they play a very important role in the service firms housed in the virtual community, since these firms benefit most from the feedback and co-innovation that participants generate. Not only the platform's service firms benefit from users' participation in co-innovation activities, but also the platform users themselves, since users identify more with the virtual community when they feel heard and taken into consideration. Along these lines, to encourage identification with the virtual community of users who share comments on a lower range of services, it is very important that these users feel rewarded for their advocacy, feedback, and help to others. Actions that could be planned to improve this aspect might include incentives (for example, congratulatory messages) when users who always comment on one service category begin to comment on another different service category.

Finally, the managers of virtual communities (for example, managers of TripAdvisor) benefit from users who propose improvements in informational content, website aesthetics, etc., since making these improvements in the virtual platform helps to improve users' perception of their ease of use and utility, with positive repercussions for attitude (e.g., trust) and identification with the virtual community.

FUTURE RESEARCH DIRECTIONS

Some limitations of this study must be noted and can give rise to future lines of research. First, engagement was obtained through survey responses based on respondents' perceptions. It is advisable to follow up by analyzing respondents' real behavior in the virtual community. Next, since the study was performed with a group of participants representative of the Spanish market, repetition of the study in other geographic contexts would give it greater external validity. In addition, other aspects of engagement may exist than those considered in this model. Other consequences of engagement different from identification (e.g., CE, etc.) could also be incorporated.

CONCLUSION

First, this chapter analyzes users' engagement in a third-party-managed virtual community (an online community of travelers). Secondly, based on the engagement shown, the study details the users' identification with the virtual community. Thirdly, the study provides results on the community user's profile (range of comments made, frequency of commenting, and type of platform used to access the community: web, mobile application).

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KEY TERMS AND DEFINITIONS

Community Identification: The degree to which community members perceive that they and the virtual community share the same defining attributes.

Community Participation: Users' participation in the virtual community through advocacy, feedback, help to others, and co-innovation activities.

Enjoyment Benefits: Benefits derived from the enjoyment and relaxation involved in interacting with users in the virtual community.

Learning Benefits: Benefits that the virtual community participants derive from acquiring and strengthening their understanding of the environment.

Social Benefits: Benefits of strengthening the consumer's ties with relevant others in the virtual community.

Third-Party-Managed Virtual Community: A virtual community established by a third party to facilitate exchange of products, services, and information (e.g., eBay, TripAdvisor).

User Engagement: The user's intrinsic motivations to continue interacting with a virtual community and intention to participate in a virtual community through advocacy, feedback, help to other users, and co-innovation activities.

Chapter 4
Service Innovation for Customer Engagement in the Italian Banking Sector:
A Case Study

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ABSTRACT

The financial crisis of 2008 produced various effects on banks compelled to rethink their business models, especially for better customer relationship management following the general climate of distrust among consumers towards financial institutions. In this context, understanding how to both satisfy and engage customers has become very important. The aim of this chapter is to investigate the role of service innovation in customer engagement in the banking sector. This chapter analyzes the effects of innovative services on customer satisfaction through the study of an Italian people's bank and the application of the Kano model. The results allow identifying those services that should be improved, as they are able to increase customer satisfaction and stimulate customer engagement. For practitioners, this chapter provides evidences on how new technologies allow banks to offer high quality and personalized services through which it is possible to improve the experience of customers and their relationship with the bank.

INTRODUCTION

Since the global financial crisis of 2008, the world-wide banking sector generally has experienced several challenges. Italy, in particular has been impacted by the crisis more than other European countries: Italian banking incomes fell by 8% between the first quarter of 2008 and the second of 2009, while in the rest of the euro area the fall was only 5%. The Italian banks crisis reached a peak in 2015 when, according to data from the Bank of Italy (2017), 22% of loans were at risk of non-repayment; non-performing and deteriorated loans tripled as a percentage of total loans, reaching a point where they completely absorb operating results (Angelini et al., 2017; Visco, 2018). Between 2011 and 2016, Italian banks showed losses of 62 billion euros. Only the prevalence of traditional business models, strict supervision by the Supervisory Authority and the application of prudent criteria in the granting of loans prevented the collapse of the Italian banking system.

The Italian banking system is composed of 60 banking groups and 538 banks of which 147 are joint stock companies, 23 credit unions, 289 cooperative banks and 79 are branches of foreign banks. 25% of the market share is people's banks of approximately 70 institutions with more than one million members and twelve million customers, generating € 226 billion in loans, € 264 billion in funding and with total assets of € 270 billion (Assonebb, 2018). People's banks are credit institutions, usually set up as cooperative societies, aimed at sustaining the territorial development and the growth of the reference communities. Their business model is focused on building close and lasting relationships with SMEs and families. This banking model reflects the typical Italian entrepreneurial and industrial system, which is made up of 99.9% small and medium sized enterprises, 95.3% of which have less than 10 employees. In this context, people's banks are those closest to micro and small entrepreneurs and with a structure able to integrate this model of widespread entrepreneurship. During the last decade, people's banks were able to limit the effects of the crisis, especially on SMEs, thanks to the adequate level of their capitalisation, which allowed them to cope with the credit risks they assumed and the application of adequate adjustments to their loan coverage (Alessandrini & Papi, 2018). In fact, from 2007 to 2014, people's banks increased their presence in the territory and their market share by 2.1% (Stefani et al., 2016). This was also possible thanks to the ability of these banks to establish trusted and privileged relationships with their customers, which favour the reduction of information asymmetries, the prudent management of risks (Fedele, 2015; Formisano, 2015), and the discouragement of opportunistic behaviours by customers (De Young et al., 2012).

From a managerial point of view, two factors could be behind the success of people's banks in this new, post-crisis era:

- *Service innovation* affects the satisfaction of customers who are increasingly looking for innovative financial products and for a faster and easier service enabled by new technologies. In 2017, the number of households using digital channels grew by 6%, online operations amounted to 24 million (80% of the total). Hence, being able to combine the needs of technologically advanced clients together with those of clients who seek or need the physicality of traditional operations allows for both simplified communications and the maintenance of strong relationships with customers.
- *Customer engagement* has always represented the people's banks' strength. These banks, in fact, operating in a stable manner and covering a small geographical area are able to get to know their customers well and so build relationships based on trust, mutual listening and continuous interac-

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tion. Hence, customers recognize their bank not as a suprasystem, but as a partner willing to listen to problems and look for the best solutions for their clients. Customers who are engaged tend to be more committed to their bank. Understanding engagement in the banking sector is a new learning perspective on consumer behaviour and interactions within the service production process.

The extant literature documents a plethora of studies that have investigated service innovation in banks. The majority of these studies identified service innovation in banks with the adoption of digital technologies for service delivery (Mbama, 2018; Gupta &Arora, 2017; Asfour & Haddad, 2014; Bharti, 2016). However, each work focused on a single aspect such as the effects on corporate culture (Uzkurt et al., 2013), on performance (Lyons et al., 2007), on technology acceptance (Ozdemir & Trott, 2009), but there is a lack of studies on the effects of banking service innovation on customer satisfaction and engagement. It is this gap in the literature that this study aims to fill.

Based on these considerations, the aim of this study is to examine the extent of customer satisfaction and engagement with the innovative services of an Italian people's bank with a view to determining which service innovations should be prioritised because they enhance customer satisfaction and which should be abandoned because they do not improve customer satisfaction. This is important for the management of the banks to know because, as highlighted in the literature, customer satisfaction is the most important antecedent of customer engagement. This aim will be achieved by applying the Kano model to a case bank.

BACKGROUND

Service Innovation in Retail Banking

Service innovation can be defined as changes in service concepts or service delivery processes (Menor et al. 2002; Aas & Pedersen 2010) driven by new technologies or organizational competences (Ark et al., 2003) that create added value to the client by means of new or improved solutions to a problem, methods of improving performance, or a desired opportunity for consumption or consumer services (Tidd & Hull, 2003).

According to Meng and Guo (2013), service innovation is essential for banks to provide customers with high quality services and to enhance their own competitiveness. In this sector there is a growing need to offer fast services without impairing quality, with perhaps the chief benefit for the client being 24-hour availability (Siddiqi, 2011). The speed of access to information and differentiated products and services over the internet generates greater expectations among clients (Verhoef et al., 2009; Formisano et al., 2018).

A holistic definition of service innovation in banks is provided by Zhou and Xu (2015) who refer to it as the banks' service behaviour and service activities, such as the investment in the banks, personnel and technology input on research and development, improvement of financial service quality, expansion of the scope of services, obtaining financial products' patents, increasing revenue, and creating new value for customers.

According to Smit et al. (2016), service innovation in retail banking can be of different types such as (1) products and services innovation, (2) organisational innovation and (3) distribution channel innovation.

1. *The products and services innovation* in retail banking may concern current accounts, savings, lending, investment and insurance services. Banks can offer innovative management of current accounts able to reduce costs for customers (Capgemini & Efma, 2013). With regard to transactions, banks can adopt customer-centric technological innovations (PwC, 2012) that allow customers to execute transactions independently by simplifying the process (Ginovsky, 2013). With respect to loans, banks can offer innovative options (O'Neill, 2012) or add to those standards services like the management of clients' investment portfolios, advice regarding their tax situations, their retirement planning and their estate planning (Smit et al., 2016).

2. *Organisational innovation* in banking activities mainly refers to the banking infrastructure in terms of banking information systems, risk assessment and management, capital allocation and other organizational innovations. According to Goh and Kauffman (2013), through investments in information technology banks may process a multitude of transactions ensuring more security and updates and, therefore, better services to their customers (Wolfe, 2006, 2008). Information technology helps reduce costs by increasing efficiency, thus improving the customer experience (McKenzie, 2013). Moreover, these technologies offer banks sophisticated credit scoring techniques to better evaluate the creditworthiness of customers (Bofondi & Lotti, 2006).

3. *Distribution channel innovation* in retail banking mainly concerns access to banking services through innovative and instantaneous channels such as ATMs, mobile banking and internet banking (Chandio, 2013). The digital banking service allows customers to access services via telephone, internet and mobile (Dootson et al., 2016). In particular, internet banking allows customers to conduct financial transactions on a secure website offered by the financial institution (Lee &Chung, 2009; Martins et al., 2014), generally accessible through a portable device or desktop PC (Shaikh & Karjaluoto, 2015), while mobile banking allows access to services via mobile phones (Lin, 2013). In any case, these are self-service delivery channels that allow the overcoming of time and space limits in accessing banking services (Laukkanen, 2007) as well as high levels of personalization and convenience (Laforet & Li, 2005, Lee, 2005, Zhang et al., 2012). These features reduce costs and improve the quality of services (Xue et al., 2011; Nagdev & Rajesh, 2018) thus enhancing customer satisfaction, trust, loyalty and retention (Martins et al., 2014; Amin, 2016; Raza et al., 2015; Jun & Palacios, 2016; Kaura et al., 2015; Monferrer-Tirado et al., 2016; Lee & Chung, 2009).

Customer Engagement and Its Links With Service Innovation

Customer engagement is defined by the Economist Intelligence Unit (2007, p.2) as "the creation of experiences that allow companies to build deeper, more meaningful and sustainable interactions between the company and its customers".

Many authors have seen customer engagement as a means to initiate and improve value co-creation in the customer–firm relationship (Prahalad & Ramaswamy, 2004; Thompson, 2008). Engaged customers show co-creative behaviours (Kumar et al., 2010; Chen et al., 2012; Brodie et al., 2011) that are important for new product development and service innovation (Sawhney et al., 2005). In the banking sector, the relationships with the clients are shifting away from physical interaction at the bank branch to virtual interactive environments and applications (Martovoy & Dos Santos, 2012) in which clients, recognizing the benefit of using self-service, are stimulated to participate in the process and meet their own needs (Grönroos, 2008).

With regard to service innovation, it has been defined in the extant literature as both an antecedent and a consequence of customer engagement. As antecedent, several works show the role of service innovation as a key to fostering engagement's development (Kurtmollaiev et al., 2017; Carlson & De Vries, 2018; Bednall et al., 2018; Tuzovic et al., 2018; Sembada, 2018). Stock (2011) argues that providing innovative services increases the value perceived by customers (Hollebeek, 2013) who are expected to share them with others and engage with the company or brand (Kim & Garrison, 2009; Hollebeek et al., 2016, 2014). Thus, it is reasonable to assume that the direct effect of customer engagement on business performance is influenced by service innovation (Chen et al., 2018) and its perceived customer value

The idea of service innovation as a consequence of customer engagement refers to the participation of the engaged customers in the different phases of new service development (Alam, 2006). Collaboration with engaged customers has been recognized as an important source of knowledge in the design phase of innovative services (Blazevic & Lievens, 2008). During the development of innovative services, continuous customer engagement provides valuable insights and feedback (Edvardsson & Enquist, 2011) which allow the realization of innovations aimed at satisfying the specific needs of customers (Nwokah & Maclayton, 2006) thus increasing their favourable perception of the introduced innovation (Chen et al., 2018). In this regard, forming a strong bond with customers, knowing what they want, and allowing them to co-create service delivery becomes essential (Kandampully & Duddy, 1999). Adopting this perspective, Oliveira and Hippel (2011) have shown that users play an important role in the innovative development of banking services.

Customer Engagement in the Banking Sector

After the financial crisis of 2008, in an industry driven by more or less similar products and services, with increasing international competition and customers' expectations, banks had problems recognising customers' needs, connecting with them and retaining them (Monferrer-Tirado et al., 2016). Some banking organisations are making considerable efforts to engage better with their customers (Marinkovic & Obradovic, 2015). Customer engagement in the context of the banking industry is defined as the cognitive, emotional and behavioural involvement/attachment of a person with a particular bank and with the services provided by that bank (Sondhi et al., 2017). Moliner et al. (2018), through a literature review, found that in recent years only a few studies have highlighted the importance of customer engagement for financial institutions (Alloza, 2008; Bielski, 2008; Hollebeek, 2013; Giannakis & Boutsouki, 2014; Khan et al., 2016; Pansari & Kumar, 2017), and these same studies still continue to draw attention to the lack of research in the banking sector.

Several authors have explored the construct of customer engagement in order to identify facilitators and barriers to adoption of engagement (Kalaiarasi & Srividya, 2013). Sondhi et al., (2017) state that trust, satisfaction, loyalty and advocacy must be considered as dimensions of banking customer engagement and that there is a higher level of engagement amongst the clients who have had a longer alliance with the bank. Several studies show that the affective dimensions significantly affect customer engagement (Vatanasombut et al., 2008; Cater & Zabkar, 2009). Customer engagement is not only determined by purely transactional reasons linked to utilitarian gains, but is strongly influenced by emotional and relational factors (Bhat & Darzi, 2016) such as brand trust and commitment (Levy and Hino, 2016). Hence, brand management may play a relevant role in customer engagement in financial institutions (Petruzzellis et al., 2011; Wang et al., 2012; Khan et al., 2016; Levy & Hino, 2016; Monferrer et al., 2016).

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Several studies assess the engagement of customers in banks by measuring the level of e-banking adoption (Ali & Bharadwaj, 2010) and mobile banking services (Gómez-Barroso & Márban-Flores, 2014). Mobile banking plays a double role in the management of customer relationships: on the one hand, being a self-service technology, it tends to replace human interaction, making relationship marketing more difficult (Hoffman & Novak, 1996; Sang & Rono, 2015), on the other hand, by offering greater flexibility, connectivity and personalization (Ha et al., 2012), it allows for loyalty and the engagement of customers (Laukkanen, 2016). However, most authors studied the adoption of mobile banking using the Technology Acceptance Model (TAM) of Davis (1989) (Shaikh & Karjaluoto, 2015), while few studies assess the impact of mobile service quality on relationship management with customers (Arcand et al., 2017). According to Arcand et al. (2017), the quality of mobile services exerts a positive effect on customer trust, satisfaction and commitment thus enhancing engagement. The authors examined mobile banking not only from an adoption standpoint but also from a relationship marketing perspective, showing that hedonic components should not be ignored in efforts deployed to satisfy/engage customers. A mobile environment able to create an enjoyable and secure customer experience ensures customer engagement (Jamshidi & Hussin, 2016; Nadeem et al., 2015).

METHOD

This study is based on the exploratory qualitative method of case study. A people's bank in Italy was selected for its positive performance since 2008, considering its increasing economic-financial performances, customer base, and customer retention.

According to the methodology of Yin (2003), the case study has been conducted by seeking to triangulate data through the intersection of different sources. Primary data has been collected through interviews with the CEO and managers of the selected bank, and integrated and compared with secondary data extracted from several documents such as financial statements and bank reports. To ensure internal validity, protocols for the development and formalization of the case study were used; to get external validity analytical generalization based on Yin (2003) was adopted.

In order to evaluate the effects on customers of the innovative services offered by the selected bank, this study used the Kano Model methodology (Kano et al., 1984). This model facilitates the evaluation of customers' satisfaction with services on the basis of their level of functionality.

The Kano model (Kano et al., 1984) evaluates product or service attributes on the basis of customer satisfaction. The traditional models evaluate quality in a unidimensional way assuming that a higher quality always translates into an increase in customer satisfaction. However, several studies show that the relationship between quality and satisfaction is not always linear (Kano et al., 1984; Matzler et al., 2004; Chen & Chuang, 2008; Basfirinci & Mitra, 2015). To overcome the limitations of traditional models, Kano developed a two-dimensional quality evaluation model based on Herzberg's two-factor theory (1966), which includes motivating and hygienic factors (Oh et al., 2012). The Kano model allows the exploration of the nonlinear and asymmetric relationships between the various attributes of a product or service and customer satisfaction and provides information on which product or service attributes should be prioritized. Therefore, through this model managers can easily identify the attributes on which to concentrate resources to increase customer satisfaction, as well as the attributes that a new product or service should necessarily possess. From the literature, it emerges that the Kano model has been widely applied in different research fields. In particular, in the field of service marketing several authors have

applied it to investigate the best strategies to maximize customer satisfaction (Pawitra & Tan, 2003; Kim et al., 2009; Chen et al., 2011; Chang & Sung, 2012; Chen, 2014; Basfirinci & Mitra, 2015; Lin et al., 2015; Chen & Chen, 2015; Pai et al., 2018). With regard to the banking sector, the Kano model has been used to prioritize the factors affecting customer satisfaction of the quality of bank services (Kazemi et al., 2013), to investigate the effect of e-banking services on customer satisfaction (Kamalian et al., 2014), and to classify the service quality in the context of the Indian banking sector (Bandyopadhyay, 2015)

In this work, the Kano model is used to analyse customer satisfaction with the services offered by the selected bank in order to identify which services must be improved, which services should be abandoned and which services should continue to be provided in the same way.

The questionnaire was distributed to 500 customers via their e-mail address through a Google form link. 259 responses were collected with a response rate of 51,8%. The characteristics of the sample are described in Table 1.

In the first section of the questionnaire, information on the type and duration of the relationship with the bank was collected (Table 2).

The analyses of the results allowed the identification of those services that should be improved by the bank to increase customer satisfaction and hence stimulate customer engagement.

Table 1. Characteristics of the sample

Age		Levels of Education		Profession	
18-30	39%	Primary education	0%	Executive/Official	7,6%
31-50	37.5%	Lower secondary education	1,5%	Entrepreneur	9,5%
51-70	19.7%	Upper secondary education	29%	Independent contractor	19,3%
+ 70	3.8%	First stage of tertiary education	50,8%	Unemployed	1,5%
Sex		Second stage of tertiary education	18.7%	Civil servant	11,4%
Male	52.1%			Employee	25%
Female	47.9%			Student	12,5%
				Housewife	3%
				Pensioner	5.3%
				Other	4.9%

Table 2. The relationship with the bank

Type of Relationship		Length of the Relationship	
Personal	79.5%	<5 years	33.7%
Business	4.2%	5-10 years	29.9%
Both	16.3%	>10 years	36.4%
Contemporary relationships with other banks		Corporate relationship with the bank	
Yes	30.4%	Yes	11.8%
No	69.6%	No	88.2%

CASE STUDY

The Banca Popolare del Cassinate (BPC)

The Banca Popolare del Cassinate (hereafter "BPC") is a people's bank located in the centre of Italy. It was founded in 1955 with the aim of supporting the social and economic regeneration of the city of Cassino, which was seriously damaged by the Second World War. From the 1970s, BPC began to grow rapidly with the transformation of the reference territory from a predominantly agricultural area to an industrial area with a tertiary vocation. The bank supported this development by using available funds to grant loans to households and local businesses. Over time, BPC expanded geographically, opening numerous branches so that by 2015 it covered the entire territory of the province. This development was supported by a series of strategic choices: the merger by incorporation of a small local cooperative bank (1996); outsourcing of the IT system (1997); participation in the capital of an important merchant bank and a Stock Broking Company (1998); cooperation agreements with credit and financial institutions and cultural and training organizations. While Italian banks have reduced the number of employees in recent years due to the development of virtual channels, mergers of small banks and the reduction in bank branches, BPC has continued to hire reaching 150 employees and has increased the number of its active branches (Table 3).

BPC has continued to grow over time, reaching different goals that demonstrate its success. The magazine "L'Atlante delle banche leader" awarded it the following accomplishments: in 2013, it was ranked as the top performer in terms of value creation among smaller credit institutions; in 2014, it was included in the medium-sized banks category and it came first among all retail banks of this category; in 2015, it was ranked as the top performer according to the MF Index[1]; in 2016, it was recognized as the most excellent bank in the Lazio region; in 2017, it was ranked first in the Lazio region for capital profitability and third among all commercial banks.

Through its activities, BPC was also able to create value for its shareholders by increasing the current value of the shares held and the dividends distributed on the basis of the annual profit generated[2] (Table 4).

During the period of the global financial crisis, which significantly affected the credit sector, BPC more than doubled its net worth, which went from 59 million euros in 2005 (excluding the operating surplus) to almost 124 million euro in 2015.

Table 3. Trends in the number of bank branches

	2009	2016	Δ 2016-2009	Δ% 2016-2009
Italy	34.036	29.027	- 5.009	- 14.7%
Centre-North Italy	26.840	22.853	- 3.987	- 14.8%
South Italy	7.196	6.174	- 1.022	- 14.2%
Banca Popolare del Cassinate	18	25	+ 7	+ 38,9%

Authors' elaboration from Alessandrini & Papi (2018) and Banca Popolare del Cassinate (2018)

Table 4. Results achieved in the period 2007-2017

Year	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Shareholders' equity (profit included)	€ 70.335.948	€ 72.502.319	€ 75.271.163	€ 76.398.457	€ 72.755.504	€ 104.378.570	€ 118.872.930	€ 128.509.023	€ 132.458.679	€ 119.354.909	€ 119.699.601
Net income	€ 5.632.976	€ 5.857.643	€ 4.682.331	€ 4.081.437	€ 4.246.927	€ 8.002.868	€ 8.104.570	€ 9.304.607	€ 8.545.547	€ 8.441.425	€ 8.086.387
Profits distributed	€ 2.336.078	€ 2.362.776	€ 2.362.776	€ 2.754.858	€ 3.003.529	€ 4.271.685	€ 4.397.992	€ 4.973.732	€ 5.104.456	€ 5.010.335	€ 4.922.936
direct fund-raising	€ 383.632.000	€ 420.346.000	€ 492.175.000	€ 535.542.000	€ 535.749.000	€ 614.431.000	€ 675.001.000	€ 733.646.000	€ 781.440.000	€ 766.425.000	€ 765.481.000
Total loans	238.481.000	284.477.000	355.270.000	375.041.000	414.141.000	443.682.000	474.299.000	479.439.000	488.036.000	539.003.000	561.275.000
Total bank accounts	ND*	ND	ND	29300	25380	21300	26225	26500	29300	31950	32945
Number of shareholders	1263	1281	1344	1364	1364	1368	1382	1381	1373	1361	1349

*Data not available

Source: Banca Popolare del Cassinate (2018)

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Customer Engagement and Service Innovation in BPC

The success of BPC can be traced to its attention to the needs of customers and its propensity for innovation. A practical example of this approach is the restyling of the subsidiaries that since 2009 have been designed in order to create a more welcoming environment, enhancing personal relationships, offering innovative services and protecting customers' privacy.

With this in mind, BPC created an elegant and comfortable environment for its customers where they can socialize and relax on sofas, reading newspapers and watching TV. To allow parents to carry out their operations in complete tranquility inside the bank, BPC created a baby area where they can entrust their children to the supervision of qualified staff for the participation in educational and gaming activities. To ensure the privacy of its customers, BPC has separated each teller / cashier booth by sliding doors thus facilitating a secure and confident communication between customers and operators. Furthermore, BPC offers the most advanced technological services such as online services, mobile banking and automated teller machines, which allow customers to access banking services without time and space limits in an accessible and secure environment. With the same aim of accessibility and innovation, BPC is implementing an important project that involves the installation of automated peripheral devices in the most remote geographical areas where there are no branches. Through these installations, customers can carry out most operations without having to go to a branch office; in fact, in addition to the classic operations that can be achieved through ATMs such as deposits, payments and withdrawals, customers can consult operators through a video consulting service workstation, print documents and sign them remotely through cutting-edge technologies (Formisano et al., 2016a).

In order to better meet the needs of its customers, BPC provides specialized financial advisory services and subsidized financial services for certain categories of savers. Special attention is dedicated to young people to whom the "first idea" project was dedicated to finance innovative start-ups of young entrepreneurs (Trequattrini et al., 2014; Formisano et al., 2016b). "Prima Idea" provides for the disbursement of unsecured loans of 50.000 euros each at zero interest, without any preliminary expenses, which can be reimbursed in 10 years. The loan amount can be increased if the business project generates positive employment effects. Moreover, the bank offers many students and young graduates from the University of Cassino and Southern Lazio the possibility of completing traineeships and internships in order to facilitate the meeting between studies and working experiences.

One of the most important initiatives for customer engagement is the creation of a flagship branch aimed at increasing brand awareness and promoting the brand and corporate values. The flagship branch offers extended opening hours, high-tech technologies and personnel specialized in managing relationships with customers and enhancing their experience. It also includes:

- An area reserved for shareholders, where they can organize meetings and carry out other activities;
- A multimedia museum dedicated to the history of Cassino where a virtual tour of the city as it was before the war is offered;
- The BPC ON video consulting service workstation.

This flagship branch therefore represents a place where the bank can strengthen its brand equity by transmitting its corporate philosophy and its values, expressing its attention to the stakeholders and promoting its commitment to the territory. With regard to this last aspect, BPC has decorated the branch

with photographic images and artistic works concerning the territory and in particular the famous abbey of Montecassino; it periodically organizes events within the branch for the promotion and enhancement of the territory; has allocated 20 million euros of funding for the renovation of historic centres and the environmental protection of the territory.

BPC within the reference environment also encourages integration between companies, their growth in size, as well as its welfare by investing in culture, art and sport.

Results of the Kano Model

In order to apply the Kano model, two classes of services were identified through interviews with the BPC's managers: (1) services that represented the specific selected bank's innovative offering; (2) services that represented more general service innovation in the banking sector (Table 5).

In order to uncover customers' perceptions of the different services, a Kano questionnaire was designed in a dualistic way, incorporating functional and dysfunctional questions (Chen, 2012; Oh et al., 2012). It consisted of a pair of questions for each service evaluated:

- A functional question, which evaluates how customers feel if they have the service;
- A dysfunctional question, which evaluates how customers feel if they don't have the service.

Each question in the survey took the form "how do you feel if you had / did not have this service", the possible answers were:

- I like it
- I expect it
- I am neutral
- I can tolerate it
- I dislike it

Table 5. BPC's services

Innovative Services of BPC	**S1**	Baby Area
	S2	Separated teller / cashier booth
	S3	Exhibition space for products/services promotion
	S4	Space for socio-cultural events
	S5	Automated peripheral devices
Innovative Services in the Banking Sector	**S6**	Online services and mobile banking
	S7	Automated teller machines
	S8	Preferential financing for female entrepreneurship
	S9	Preferential financing for youth entrepreneurship
	S10	Specialized financial advisory services

Based on the work of Blauth et al. (1993), for each service another question was included to ask customers how important that service was to them. Respondents used a Likert scale ranging from 1 to 9, where 1 = Not at all important and 9 = Extremely important to indicate their answer.

As required by the Kano method, based on the results, the services were classified into 5 categories (Table 6): One-dimensional services (O) that customers like having and dislike not having; Must-be services (M) that must be met for customer satisfaction; Attractive services (A) that generates high levels of customer satisfaction when fulfilled, but it does not cause customer dissatisfaction when absent; Indifferent services (I) that do not affect customer satisfaction whether they are present or not; Reverse services (R) that lead to customer dissatisfaction when provided and customers satisfaction when not provided. Finally, Questionable (Q) answers are generated by respondents' inadequate understanding or by their marking wrong answers by mistake (Basfirinci & Mitra, 2015; Chen, 2012; Oh et al., 2012).

After categorizing the services, two different levels of analysis were carried out: discrete and continuous. The discrete analysis, after the categorization of each respondent's answers using the Evaluation table (see Table 6), counts the total responses in each category for each service and assign the category corresponding to the most frequent response (the mode) (Table 7). For the self-stated importance ranking it calculates the average for each service.

The discrete analysis allows providing a general sense of the results but it presents several limits. First of all, a lot of information could be lost along the way (all respondent's answers get further reduced into a single category for each service); moreover it doesn't have any sense of the variance in the data; and softer answers get the same weight as harder ones. For these reasons, the method of the continuous analysis proposed by DuMouchel (1993) was added. The answer options were converted in a satisfaction potential scale going from -2 to 4 and the importance of each feature was measured from 1 to 9.

- **Functional:** -2 (Dislike), -1 (Live with), 0 (Neutral), 2 (Must-be), 4 (Like);
- **Dysfunctional:** -2 (Like), -1 (Must be), 0 (Neutral), 2 (Live with), 4 (Dislike);
- **Importance:** 1 (Not at all Important), …, 9 (Extremely Important.)

This asymmetrical scale (starting from -2 instead of -4) allows the attribution of a less weight to negative responses (Reverse and Questionable) that are weaker than positive ones (Must-be and One-dimensional). On the basis of these scores it was possible to categorize the services within a two-dimensional plane (Table 8).

Table 6. Evaluation table

		Dysfunctional (Service Absent)				
		Like it	**Expect it**	**Don't care**	**Live with**	**Dislike**
Functional (Service present)	Like it	Q	A	A	A	O
	Expect it	R	Q	I	I	M
	Don't care	R	I	I	I	M
	Live with	R	I	I	Q	M
	Dislike	R	R	R	R	Q

Table 7. Discrete analysis

Discrete Analysis								
Service	**M**	**P**	**A**	**I**	**R**	**Q**	**Total**	**Category**
S3	6.18%	10.42%	16.60%	42.86%	10.04%	13.90%	100.00%	**I**
S1	5.02%	17.76%	21.62%	33.20%	4.25%	18.15%	100.00%	**I**
S4	5.79%	20.08%	15.83%	39.00%	5.41%	13.90%	100.00%	**I**
S5	13.57%	35.27%	12.02%	23.26%	4.26%	11.63%	100.00%	**O**
S2	27.41%	33.59%	14.29%	13.51%	2.32%	8.88%	100.00%	**O**
S6	22.57%	49.42%	6.61%	11.67%	1.56%	8.17%	100.00%	**O**
S7	25.78%	44.92%	3.13%	14.06%	1.56%	10.55%	100.00%	**O**
S8	9.69%	46.12%	9.30%	24.03%	1.55%	9.30%	100.00%	**O**
S9	15.50%	56.59%	6.59%	8.91%	1.16%	11.24%	100.00%	**O**
S10	23.26%	38.76%	9.30%	20.16%	0.39%	8.14%	100.00%	**O**

Table 8. Continuous analysis

Continuous Analysis				
Service	**Dysfunctional (X)**	**Functional (Y)**	**Importance (Z)**	**Category**
S3	0.96	1.26	5.39	**I**
S1	1.40	2.02	5.68	**A**
S4	1.42	1.65	5.93	**I**
S5	2.45	2.50	6.99	**O**
S2	3.04	2.83	7.75	**O**
S6	3.30	2.93	7.82	**O**
S7	3.25	2.70	7.76	**O**
S8	2.62	2.59	7.15	**O**
S9	3.36	3.21	8.12	**O**
S10	2.92	2.69	7.65	**O**

The classification of services in the different Kano quality categories occurs through the calculation of the frequency of answers distributed for each service (Chen, 2012), and this does not allow to measure the full extent of customer needs (Oh et al., 2012). To overcome this limit, the "better" and "worse" scores (or satisfaction and dissatisfaction coefficients) of Timko (1993) were calculated. These coefficients allow a numerical quantification of customer satisfaction or dissatisfaction in case of presence or absence of the service and they are calculated by applying the following formulas to the total number of answers in each category for a given service:

$$Better = \frac{A + O}{A + O + M + I}$$

$$Worse = -\frac{O + M}{A + O + M + I}$$

Better and worse coefficients provide an estimate of the average quality value for each service in terms of satisfaction and dissatisfaction (Oh et al., 2012; Shahin et al., 2013) (Tab. 9).

Although "Better" and "Worse" scores produce a numerical result and are useful for relative comparisons, they present some limits highlighted by Timko (1993) himself. The main issue regards the usage of a single Kano category for all the answers concerning each service thus creating a loss of information, a high variance in the data and an equal weighting of all answers not considering of how strong or weak they are.

In order to compare services with similar positioning, services' Functional, Dysfunctional and Importance scores and their standard deviations are shown in a scatterplot (Figure 1).

DISCUSSION

Literature shows that only by providing innovative services able to create new value for customers, is it possible to satisfy and engage them. Several authors highlight a strong and dualistic relationship between service innovation and customer engagement. It was demonstrated that service innovation enhances customer engagement, which in turn stimulates service innovation through the participation of customers in new service developments. In this relationship, customer satisfaction seems to act as a mediator: innovative services stimulate engagement only if they are able to satisfy customers (by fulfilling a need and adding value) and only satisfied customers will be motivated to participate in the service innovation

Table 9. Customer dis/satisfaction coefficients

Service	A	M	O	I	BETTER	WORSE
S1	56	13	46	86	0.50	-0.29
S2	37	71	87	35	0.53	-0.68
S3	43	16	27	111	0.35	-0.22
S4	41	15	52	101	0.44	-0.32
S5	31	35	91	60	0.56	-0.58
S6	17	58	127	30	0.62	-0.80
S7	8	66	115	36	0.55	-0.80
S8	24	25	119	62	0.62	-0.63
S9	17	40	146	23	0.72	-0.82
S10	24	60	100	52	0.52	-0.68

Figure 1. Scatterplot of service categories
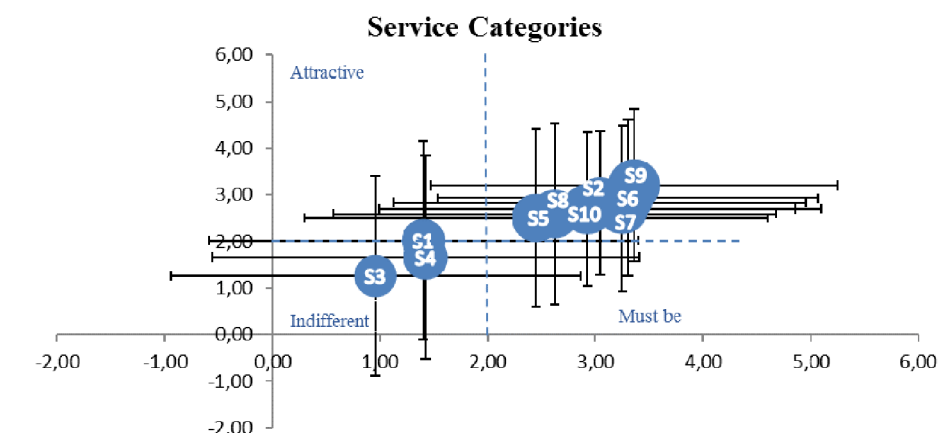
process. The BPC, after the global financial crisis, was able to realize not only positive economic-financial results, but also effective strategies of customer relationship management that allowed it to increase its customer base and obtain a significant customer retention rate.

The results of the empirical study, based on the responses of 259 customers, show that the majority of BPC services fall into the Kano category of *One-dimensional.* One-dimensional services are the ones that customers like having and dislike not having. The customers' reaction to this kind of feature is "more is better", hence the more the bank provides it, the more satisfied its customers become. These services are characterized by a proportional relationship between functionality and satisfaction: every increase in functionality leads to increased satisfaction. For this reason, these features are usually called Linear, Performance or One-Dimensional attributes in the Kano literature.

From the discrete analysis three services fall into the category of *Indifferent*, namely Baby Area, Exhibition space and Space for socio-cultural events. This means that their presence (or absence) doesn't make a real difference to customer satisfaction. However, by performing the analysis with the continuous method that emphasizes answers on the positive end (Must-be and One-dimensional), the service of the baby area falls into the category of *Attractive* features (also called Exciters or Delighters) that are unexpected features which, when present, cause a positive reaction.

The satisfaction and dissatisfaction coefficients, in line with the relevant literature, confirm the great importance of online services and mobile banking that determine an increase in satisfaction of 62% if present, but more importantly, a dissatisfaction of 80% if absent. In a similar way, the presence of Automated Teller Machines (ATM) generate 50% of satisfaction, while their absence creates 80% of dissatisfaction. The service that emerged as the most important from this analysis is the offering of Preferential financing for youth entrepreneurship able to increase satisfaction to 70% if present and dissatisfaction of 82% if not provided. The services that seem to have less influence on these coefficients are the Baby Area, the Exhibition space and the Space for socio-cultural events.

CONCLUSIONS AND PRACTICAL IMPLICATIONS

By applying the latest marketing theoretical frameworks, service innovation and customer engagement, to the banking sector, this chapter offers a contribution about the strategies for people's banks to overcome the challenges following the 2008 financial crisis. In order to better understand the role of service innovation in enhancing customer engagement, and the relative consequences on banks' performance, the case of an Italian people's bank was analysed in this work. The BPC was selected for its positive performance achieved during the last decade, when the majority of Italian banks suffered several problems. From the study of this bank, it showed a marked propensity towards offering innovative services aimed at improving the customer experience with the bank. These innovative services exert positive effects on the bank performance and on its good relations with customers. The most important services to satisfy customers seem to be those that offer functional solutions to the use of banking services, allowing customers to overcome time and space constraints, to be independent and autonomous in the execution of banking transactions and have direct control over the management of their own finances and savings. From a practical point of view, this means that banks wishing to build better relationships with their customers, in order to engage them must invest in creating new services able to achieve these goals or invest in the improvement of the existing ones, for example to increase the speed, accessibility and security of digital services and automated machines. In contrast with some of the extant literature (Arcand et al., 2017; Cater & Zabkar, 2009; Bhat & Darzi, 2016; Levy & Hino, 2016), the results show that hedonic and emotional services are not such big influences on customer satisfaction. In addition, services aimed at improving the experience within the physical branch seem to be of medium importance. Even if the functionality, security, and privacy of the branches remain fundamental aspects of the service provision on which it is important to continue to invest, there is a tendency for consumers to limit visits to branches to a minimum and to choose when and where to access their bank accounts. Are the days of bricks and mortar banks numbered? The recent announcement of the closure of 140 of its UK branches by Spanish-owned bank Santander due to changes in how customers choose to carry out their banking, seems to indicate they are. They cited a 23% fall in bank transactions in the last 3 years and an increase in digital transactions by 99% (Read, 2019).

A particular consideration should be given to the significant importance attributed to preferential financing for youth entrepreneurship. Even if this result could be influenced by the high presence of young people among the respondents (39% of the sample were between 18 and 31 years old), it could also be interpreted as the desire of consumers that the bank takes on a social role. In fact, Italy is experiencing a profound economic crisis, which has as its main consequence an exponential increase in the youth unemployment rate. The commitment of the banks to the resolution of this problem is by offering an effective contribution to society, which could help banks recover the trust and confidence of the people who blame the banks for the financial crisis, which then lead to the economic crisis. In conclusion, investing in services dedicated to young people or to the support of employment, entrepreneurship or, more generally, the economy, could help to rebuild the image of the bank as an ethical institution working to pursue social and non-private interests and which is close to the people who, in this way, will be more predisposed to interact with it and build a relationship based on mutual commitment and engagement.

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KEY TERMS AND DEFINITIONS

Banking Sector: Banks and other financial institutions which provide lending and investments.

BPC: Acronym of Banca Popolare del Cassinate, an Italian people's bank located in the city of Cassino.

Customer Engagement: The depth of the relationship a customer has with a firm or brand.

Customer Satisfaction: The extent to which companies surpass customer expectations.

Kano Model: A model to evaluate product or service attributes on the basis of customer satisfaction.

People's Banks: Credit institutions, usually set up as cooperative societies, aimed at sustaining the territorial development and the growth of the reference communities.

Service Innovation: Changes in service concepts or service delivery processes driven by new technologies or organizational competences that create added value.

ENDNOTES

[1] The MF Index measures the size and results to combine the ability of banks to grow with their ability to generate profits.

[2] More than 50 million euros of dividends have been distributed over the last 20 years and more than 72 million euros since the Bank foundation.

Chapter 5
Understanding Fluency and Friction in Customer Experience Management

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ABSTRACT

Customer experience management is a relatively new research field. Although past literature has studied certain aspects and elements of customer experience, major questions are still unanswered, including how to integrate touch-points across the customer journey and how to measure customer experience in a way that takes its multidimensional nature into consideration. This chapter attempts to provide a framework to study how customers perceive touch-points as a holistic experience and proposes an integrated approach to measuring the experience of challenges that result in what we call "friction." The framework is based on the concept of "fluency" from the engineering and omni-channel literature and suggests survey items which can be used for future empirical studies. Insights from this research can be used by various types of organizations to better identify problems in the customer experience in regard to the process and dynamics of touch-points through time and across channels/platforms, thereby enhancing value for customers and businesses.

INTRODUCTION

Optimizing customer experience is essential due to an increasingly complex network of touchpoints and peer-to-peer interactions that can magnify both positive and negative perceptions. Customer ability to quickly spread word-of-mouth and access information not vetted by the company via a variety

of channels and media allows little room for errors. It is therefore necessary to provide a seamless and consistent brand experiences that emphasize positive brand impressions and counteract negativity. While fragmented communication and globalized business models have made it difficult to measure, predict, and solve problems within multifaceted customer experiences, this paper will suggest a more holistic model for evaluating and measuring customer experience, focusing on making interactions smooth and painless as a whole rather than on individual "pain points" or "sticking points."

Established research covers areas such as buying-behavior process models, service quality, and relationship marketing, but fewer scholars have focused on the challenges companies experience when trying to create a seamless brand experience from the customer's point of view. Both practitioners and scholars often highlight individual aspects of experience as if they are operational bottlenecks rather than part of a broader system. Because customers do not necessarily think of the brand or base loyalty and feedback on fragmented elements of the experience, such an approach does not address important areas of conflict that might reduce satisfaction. Attempts to improve individual touch-points can even lead to perceived dissonance or difficulty. For instance, a customer searching for a television might rate information-gathering as satisfactory in the pre-purchase experience, but if that information is redundant and time-consuming during the purchasing process the experience as a whole might suffer. This is a critical problem even for companies that offer a well-designed experience, as friction in brand experience and the research/purchasing/onboarding processes is often hidden, as customers are more likely to remember specific challenges and negative experiences than ease of use or seamless transitions. Therefore, while engineering focuses on fluency in order to maximize efficiency, in customer experience it makes more sense to study frictions.

Lemon and Verhoef (2016) suggest that while seamless integration, measurement, and improvement of touch-points would create stronger customer experiences, how to effectively do so is still a key point of debate. Customer satisfaction scores (CS) and net promoter scores (NPS) have been widely supported as valid forms of measuring service quality, but there is not yet agreement on robust measurement approaches to evaluate each aspect of the customer experience in and of themselves, let alone as a unified experience. Moreover, with few exceptions (e.g., Payne & Frow, 2004; Stone, Hobbs, & Khaleeli 2002; Cassab & MacLachlan 2009), researchers rarely discuss how multiple channels of communication might function within each touchpoint (sometimes in a contradictory way), or how they function over time. Hence, there is a clear gap between current measurement methods and the need of a holistic and dynamic view across all touch-points that change over time (McColl-Kennedy et al., 2015). For example, while overall experience might be positive in the pre-purchase experience of a new car, that might be because an excellent website or salesperson overshadowed negative online reviews or social media commentary. Similarly, the pre-purchase process might be extremely positive, but even a customer happy with their car might not recommend their brand if the experience with the dealer or salesperson during the purchasing process is extremely time consuming or negative, and those latter elements might be the focus of their subsequent communication about the brand.

As Dixon, Freeman, and Toman (2010) argued, a complex system for "delighting" or "wowing" customers might not have the intended impact on customer behavior, and it might even backfire. Increasing complexity in the process can result in more opportunity for negative touchpoints and is a reflection more of the *company's* desire to have a positive impact than on effective and efficient delivery of a product or service from the customer's point of view. Indeed, points of friction and disfluency might stem as much from the desire to "fix" problems by adding layers of interaction (e.g., new channels of communication, staff, services, or a menu of options) rather than considering a change in perspective from the company

to the customer (that is, a focus on quantity/quality rather than net effectiveness). If a customer is on a first date, for instance, a restaurant manager that comes to the table to ask about the quality of the meal might be an unwelcome intrusion, even if it is intended to solve inconsistencies in customer experience as reported by a service audit. Similarly, if a customer wants to finish their meal during a lunch hour, adding additional menu items or training staff to be more knowledgeable so they can explain ingredients in detail might be counterproductive.

As the authors discuss below, many scholars have argued that customers do not only evaluate the performance in each touch-point, but that they also link them together into a single experience and narrative. For example, Padgett and Allen (1997) argue that narrative psychology plays a critical role in services, since *customers must organize a complex sequence of events and their reactions to these events into a meaningful whole* (53). Stein and Ramaseshan (2016) collected such experience narratives when studying retailer interactions. Therefore, understanding how friction and fluency contribute to making this a positive or negative experience would advance the management of customer experience over time and across channels.

This chapter has three objectives:

- Review existing customer-oriented measurement techniques of customer journeys, as well as their suitability to assess the integrated and multidimensional nature of experiences
- Propose a framework to measure friction (the level of discontinuity and inconsistency) among touchpoints throughout the customer journey
- Propose survey items to measure friction by applying the framework on an existing customer journey in the automotive industry

Accordingly, this chapter draws on existing measurement methods of experience in order to identify distinctive multi-dimensional elements which may be relevant across different industries and organization types with a focus on channel and time of communication.

LITERATURE REVIEW

Defining Customer Experience and the Customer Journey

With the growing demand of high-quality service and raising expectations towards the way how companies interact with customers, the concept of customer experience has become increasingly important. Most scholars define customer experience as a multidimensional construct that is holistic in nature and involves the customer's cognitive, affective, emotional, social, and physical responses to all interactions with a firm (Hall & Towers, 2017; McColl-Kennedy et al., 2015; Jain, Aagja, & Bagdare, 2017 Verhoef et al., 2009; Schmitt, Brakus, & Zarantonello, 2015). Customer Experience Management is considered to be a holistic management approach that does not only control individual interactions but shapes cultural mindsets, gives strategic directions and enhances capabilities for continually renewing customer experiences (Homburg, Jozić & Kuehnl, 2017).

In order to better design, manage, and evaluate customer experiences, various approaches have been suggested to describe and visualize them. "Service blueprinting," for instance, breaks down and maps out a service experience in succeeding stages and steps. These operational processes include both the

internal company procedures and the interactions between a company and customer which together form a service (Bitner et al., 2008). In more recent years, the "customer journey" approach emerged, mapping touch-points of a service encounter. This approach complements service blueprinting by better describing what is actually happening from the customer's point of view (Zomerdijk & Voss, 2010; Halvorsrud, Kvale & Følstad, 2016). Furthermore, this approach emphasizes that the customer experiences a firm or brand by *living through a journey of touchpoints along prepurchase, purchase, and postpurchase situations* (Homburg, Jozić & Kuehnl, 2017) (384). These touchpoints are defined as any verbal (e.g., talking to a salesperson or noticing an advertisement) or nonverbal (e.g., using a product or visiting a retail store) incident perceived by a customer and consciously related to a given firm or brand (Duncan & Moriarty 2006). Hence, in customer journey mapping, these touchpoints are modeled in the order they occur for the customer (Halvorsrud, Kvale & Følstad, 2016).

Measuring Customer Experience and the Customer Journey

Customers have become increasingly empowered through technology and globalization, hence companies are forced to market entire experiences instead of product assortments (Frow & Payne, 2007). A large variety of measurements and tools have been developed, but the various approaches are still too fragmented and insufficient to gain a full picture of the overall customer experience, at each stage in the customer journey and for all touch points (Lemon & Verhoef, 2016). Consequently, Jain, Aagja, and Bagdare (2017) suggest that there is a need to develop robust measurements of customer experience quality.

Customer Satisfaction (CS) Metrics

Customer Satisfaction scores are used in many industries as a means to collect customer feedback, often focusing on specific parts of the customer experience (e.g., sales, service, and product experience). When strategic benefits of product and service quality became apparent in the 1980s and 1990s, researchers focused on the identification and measurement of customer perceptions of quality dimensions (Bolton & Drew, 1991). Oliver (1997) defines CS as *the judgment that a product or service feature, or the product or service itself, provided (or is providing) a pleasurable level of consumption-related fulfillment, including levels of under- or overfulfillment*. (8) The basic idea behind CS metrics is that consumers assess the performance of the product, service, or sales experience in comparison with a standard (Spreng & Mackoy, 1996). This standard has been described by authors in different ways: predictive expectations, in which the customer compares to what they believe will happen (Bitner, 1990; Parasuraman, Zeithaml & Berry, 1994; Zeithaml, Berry & Parasuraman, 1993), disconfirmation of predictive expectations, in which their experience exceeds prior expectations (Oliver, 1993), and comparisons with broader experience-based norms, ideals, values, desires, equity, etc. (Spreng & Dixon, 1992; Woodruf et al., 1991). Within the service experience, CS literature often uses SERVPERF (part of the SERVQUAL scale) to measure perceptions of service and the retail service quality (DTR) scale for product-focused interactions (Mehta, Lalwani, and Han 2000).

Literature on CS usually focuses on specific stages of the customer journey. For example, Spreng and Mackoy (1996) analyze after-sales based on the notion that CS refers to service satisfaction, whereas Devaraj, Fan, and Kohli (2002) and Bridson, Evans, and Hickman (2008) emphasize channels. Smith, Bolton and Wagner (1999) proposed a framework and measurement model for CS with service failures and recovery, which implies that the customer has already gone through the pre-purchase and purchase

stages. Meinzer et al.'s (2016) study of BMW's customer satisfaction demonstrated how concepts dawn from determining patient satisfaction in the healthcare sector can be applied to the automotive industry for the service experience, especially regarding service encounters, situational factors, and sociodemographics, although its emphasis on the post-purchase experience and an industry transferal might not translate into a reoccurring cycle (i.e., loyalty) and thus limits its applicability. With the growing e-commerce business, several scholars propose new measurement methods in the digital experience. For instance, Wang, Tang and Tang (2001) suggest that customer information satisfaction (CIS) is a reliable and valid measurement of the effectiveness of websites for selling digital products and services.

CS literature distinguishes between two measurement levels: the aggregate level, which captures the customer's feedback on customers' overall satisfaction (single item), and the attribute level, which identifies satisfaction regarding a specific aspect or dimension of the offering, and then aggregating the assessments into an overall satisfaction score (Szymanski & Henard, 2001). These assessment levels might be independent, but they might also reveal causal relationships in which customer satisfaction or dissatisfaction in one element might impact perceptions of the whole and vice versa (Mittal, Ross & Baldasare 1998).

Many studies have investigated the relationship between the antecedents and outcomes of customer satisfaction. Anderson and Sullivan (1993) provide evidence that satisfaction increases with both perceived quality and disconfirmation, and that it has a positive impact on repurchase intentions. However, studies examining the use of CS to predict future business performance show rather mixed results. Morgan and Rego (2006), for instance, demonstrate that CS scores can be very useful in predicting performance, whereas Doorn et al. (2013) suggest that CS is more useful for understanding current performance than future performance. Uncertainty around CS score usefulness could be caused by many things. Companies might change their approach, customers might begin to expect positive elements and thus have a constantly rising standard, or the standards of competitors might shift in such a way that they change customer expectations.

CS measurements are popular among practitioners, in particular, and can be found across sectors. The advantage of the two measurement levels discussed above is that managers have access to an aggregated score which can be easily tracked via marketing dashboards, but they are also able to deep dive into specific items which causes lower or higher satisfaction scores. Attributes such as customer support, security, ease of use, product(s), payment all provide useful information for managers. However, CS has its limitations when managers want to understand how customers progress through the entire customer journey. A multi-attribute assessment for all stages of the journey would lead to very long questionnaires and huge datasets, which makes it difficult to collect and analyze reliable data. Considering the dynamic nature of the experience across different channels and through time, such a project would seem to be inherently problematic. In addition, companies tend to collect CS data primarily for brand-owned and partner-owned touch-points, since they can be influenced and controlled by companies and their partners. Other social/external and fully customer-owned touch-points which are important building blocks of the customer journey may be underrepresented in analysis and improvement efforts.

Customer Loyalty (CL) Metrics

Although CS proved to be a popular assessment tool, other measurements have been developed to explain how satisfaction relates to future sales performance and consumer behavior. At its core, customer loyalty reflects someone's intention to repurchase a product/service or the likeliness they will recommend it

to friends or colleagues and is therefore different from CS which is concerned about past performance. Dick and Basu (1994) were among the first who provided a conceptual framework of CL. They defined the term as the strength of the relationship between a customer's relative attitude (attitudinal loyalty, or a high favorable attitude towards a brand, product or service compared to potential alternatives) and repeat patronage (behavioral loyalty). The NPS (Net Promoter Score) suggested by Reichheld (2003) had a big impact on practitioners and scholars alike. It is calculated from a limited set of 8 questions that should reflect the level of CL, ranked by what he argued are their ability to predict consumer behavior. Only the top three questions are actually about CL, however. Reichheld claims that the most effective question asks about a customer's likeliness to recommend a company, and two additional questions are related to likeliness to repurchase and to what extent customers think a company deserves their loyalty. The remaining questions consist of general questions regarding satisfaction and belief in the company's excellence and innovativeness, which Reichheld considered to have only little general applicability. The Net Promoter Score (NPS) is determined by subtracting the percentage of customers who are detractors (low scores of 0-6 out of a 10 point scale) from the percentage of promoters (with high scores of 9 or 10) (Keiningham et al., 2007).

The aggregated nature of such questions also makes them questionable candidates for measuring customer experience properly. On the one hand, these questions ask customers about their overall perception of the company after they moved through a myriad number of touch-points during the entire customer journey. Contrary to CS questions, no specific questions in each stage of the journey are asked, therefore limiting the ability to analyze how customers experience the brand through time. On the other hand, loyalty is a forward-looking concept, giving clues to future customer behavior rather than to pressing issues which would have improved the experience as already completed. As with CS, however, researchers are skeptical about NPS's ability to predict future sales performance. Doorn et al. (2013) found NPS to be as equally a limited metric as CS, and Keiningham at al. (2007) note that while *Net Promoter has been touted as the 'single most reliable indicator of a company's ability to grow'…it is difficult to imagine a scenario in which Net Promoter could be called the superior metric* to other, more traditional methods such as the American Customer Satisfaction Index (47).

Customer Effort (CE) Metrics

Customer effort was described in an early study by Cardozo (1965), based on the idea that confirmation/disconfirmation of expectations affect customer evaluations of a product, but so does the effort they put into the process. The results of his study were rather surprising, in that they demonstrated that low effort did not necessarily produce better results; in some circumstances, like the purchase of an "exclusive" item or entry into a new restaurant with a long waiting list, effort might augment a customer's ultimate appreciation of their experience and the product. "Convenience" and "efficiency," therefore, are in some ways like price: lower is not always better, since it could suggest that the product or service is of lower quality or brings with it a lower social/cultural capital.

Dixon, Freeman, and Toman (2010) use the term "customer effort" to describe the work customers must do to get a problem solved in a service encounter, rather than the more positive concept of effort to attain a desired product discussed by Cardozo (1965). The goal here is to reduce customer effort by removing obstacles, which were identified in a study of recurring complaints about service interactions. In this context, the authors propose a new customer feedback metric called Customer Effort Score (CES), which is measured by asking a single question ("How much effort did you personally have to put forth

to handle your request?") and has been adopted extensively for evaluations of what we often think of as "customer service" (that is, handling a customer's complaint). However, as Lemon and Verhoef (2016) note, CES suffers because it lacks "strong theoretical development," and are not necessarily generalizable to other elements of the customer's experience (or to other customers than the ones complaining).

CES has the potential to capture the dynamic nature of customer experience through time and across channels, especially if conducted through deeper, qualitative inquiry. Dixon et al. (2010) identified problems with delays (time dimension), repetition (time and information dimensions), the necessity of multiple service channels (channel dimension). However, CES also has its limitations. In addition to the general claim that the theoretical background is weak, customer effort primarily focuses on problems that appear in service and after-sales encounters. In other words, customers need to be confronted with a specific service problem, and CES tells us how easy or difficult the countermeasure is for the customer to fix it. This raises the question of feasibility if managers want to proactively improve customer experience across all stages, considering that the customer journey starts much earlier in the initial consideration stage. Furthermore, the literature shows that the term "effort" has different connotations, as some authors refer to negative incidents and how to reduce them, while others claim that, to some extent, effort leads to positive customer evaluation (see Cardozo, 1965). Other scholars consider effort and fluency to be still another element of interaction, particularly with regard to how much intellectual effort and time a customer must expend to understand and respond to a message. Bae (2016) argued that increasing complexity and information can decrease engagement and positive perceptions of the content, but this is modified heavily by the person's attitude and previous experiences. If someone was invested in the topic (e.g., social cause, product, etc.), increased complexity led to increased engagement, up to a point; by contrast, less interested viewers responded negatively to complex imagery or high levels of information. Finally, the literature is not consistent about the predictive power in terms of customer behavior and business performance (Lemon & Verhoef, 2016).

From (Dis)fluency to Friction

The concept of fluency did not originate from marketing science, but instead has its origin in information processing research, where the term refers to the metacognitive ease of information processing (Schwarz, 2004). According to Alter and Oppenheimer (2009), *processing fluency, or the subjective experience of ease with which people process information, reliably influences people's judgments across a broad range of social dimensions* (219). Indeed, Tsai and McGill (2011) note that both "accessibility experiences," or the user's perception of the ease/difficulty with which they remember information or create arguments (also called "retrieval fluency" (Schwarz, 2004)), and "processing fluency," or the ease/difficulty with which a user understands and acts on external information in a "perceptual" or "conceptual" way (Chang 2018; Jacoby, Kelly, & Dywan 1989; Whittlesea 1993), substantially impact user perceptions of an action. Processing fluency is the most applicable to the customer experience, since it deals with external information. Perceptual fluency refers to feelings of ease/difficulty when sorting out information about an object (Novemsky et al., 2007), whereas conceptual fluency is the ease/difficulty experienced with the meaning of information (Reber et al., 2004). This is all subjective, of course, which makes it a useful way for marketing scholars to explore how individual customer experiences might be modified throughout the various stages of their experience with a company. For instance, Ko et al. (2015) demonstrated empirically that *cultural dimensions can influence how consumers perceive cultural congruence and*

reveal how the associated experiences of processing fluency derived from the in/congruent conditions can influence the consumers' purchase decisions in online contexts (388).

Significantly, fluency is positively correlated with increasing positive customer experiences with a product (Chang 2013), echoing the arguments of many CES researchers. The concept of fluency, however, adds important dimensions not addressed by the above methods. It allows researchers to explore and accommodate for the dynamic nature of customer experience, as the literature has shown that both the time dimension as well as channel dimension play a critical role in the perception of fluency (e.g., Wurtz et al. 2008). With the rapid development in digital peer-to-peer communication, online, and in-store technology, as well as the concurrent increase in sophistication of different marketing channels, fluency has increasingly attracted the interests of researchers as a means to investigate multi-channel interactions (Shen et al., 2018). For example, Wäljas et al. (2010) investigated user experiences associated with cross-platform interactions in web-based services. Here, the authors used "task fluency" as a concept to describe how users carry out any actions using different devices and how these actions and content are synchronized across platforms. The authors found that how well these devices and functions are organized and integrated within the system, and how tasks and actions are migrated across platforms, are the most significant aspects influencing user experience.

Fluency in the customer experience is the level at which customers experience a seamless, unhindered, and natural journey with the company/brand/product/service over time, focusing on what Cassab and MacLachlan (2006) investigated as "interaction fluency," or the *ability of front-line employees to smooth interactions with customers, as well as the efficacious performance of self-service channels* (555). More recently, multi-channel service has shifted to omnichannel strategy that integrates different channels to provide a seamless and consistent cross-channel shopping experience. Accordingly, the term fluency has been further elaborated in the literature (e.g., Shen et al. 2018), and is incredibly useful for the design of marketing, service, and product design. However, practitioners and scholars are increasingly looking for disfluency rather than fluency, as it is often more memorable and can have an iterative effect with media interaction (e.g., Jackson 2018). Thus, the concept of "friction" is more likely to be suitable when studying customer experience than fluency alone.

DIRECTIONS FOR FUTURE RESEARCH

Framework

As the process model for customer journey and experience by Lemon and Verhoef (2016) suggests, a variety of customer touch-points can be identified within the customer journey. Some of them are brand-owned (such as corporate websites), others are partner-owned (such as touch-points provided by distribution partners), and some are customer-owned (for example when customers make a choice of payment method or interact with each other). Figure 1 visualizes how customers may progress through these different touch-points, suggesting that they interact with companies and partners via different channels, platforms, and interfaces over time in a far more complex situation than is engaged in the literature on customer experience.

In a digital age flush with examples of companies rewarded for excellent service (e.g., Amazon and Costco) as well as companies that have been punished for poor service (e.g., United Airlines), understanding this journey is of paramount importance. Customers also expect to be able to flexibly and individu-

Figure 1. Interconnected view of customer touch-points across channels/platforms and through time
Source: By author
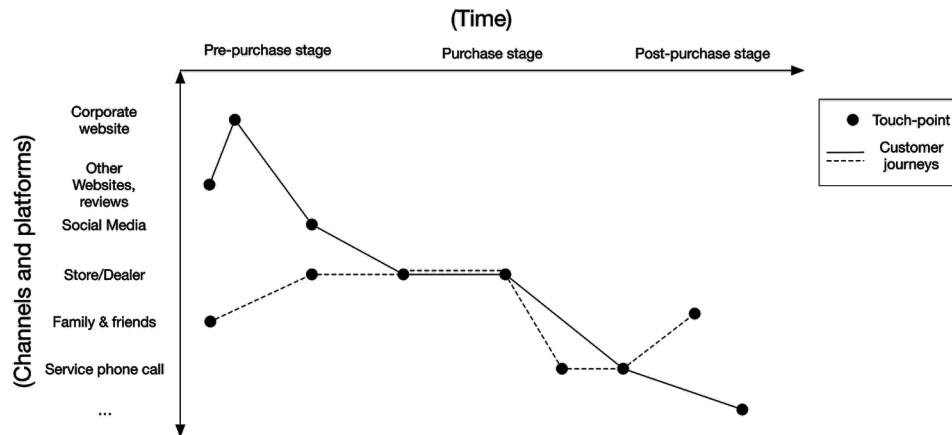
ally choose how, when, and where they interact with a company, and so each customer's process might be very different. This requires managers to assess, understand and manage those journeys that fit best each target segment in a way that is congruent with their business model. As mentioned in the previous chapter, measurement tools such as customer satisfaction (CS) are able to assess the perceived quality at specific (sets of) touch-points (such as when accessing a company website, making a service call, visiting a store or try out products), but are less suitable to understand how well these touch-points are interconnected over time to provide a smooth, natural and continuous experience. They often therefore suggest a one-size-fits-all approach to customer satisfaction and loyalty despite research that challenges those assumptions.

A new framework is proposed in this chapter based on perceived fluency theory that enables a more integrated view of assessing customer perception across all stages of their experience. The authors argue that it is essential to address omnichannel, cross-platform service contexts (channel and platform dimension) that include both technology-focused and personally-focused interactions (as well as combinations of those two), while also emphasizing the time dimension (pre-purchase, purchase, and post-purchase stages) and accommodating very different segments of customers.

Consistent with the five dimensions of fluency suggested by Majrashi and Hamilton (2015) and Shen at al. (2018), Figure 2 suggests to address experience in terms of how customers may evaluate how fluent the experience is in terms of task, cognition, content, interaction, and feeling, not only in each stage of the journey (visualized by the vertical arrow) but also across the entire experience over time (horizontal arrow).

While fluency (ease) is useful to measure, for marketers and customer experience managers it is also useful to understand how various customer and audience segments experience a *lack* of fluency: that is, friction. The points of resistance that would make the customer experience less fluent is subjective to each customer segment, of course: too much information for some customers in the pre-purchase stage or too little information for highly invested customers during the purchase stage. Initial leads become successful customers by progressing through each stage of the journey and retaining a low friction experience throughout the life of their interaction with the brand. It is proposed that friction in any of the five dimensions will hinder a successful transition from leads to (loyal) customers.

Figure 2. Framework of fluency and friction across the customer journey
Source: By author
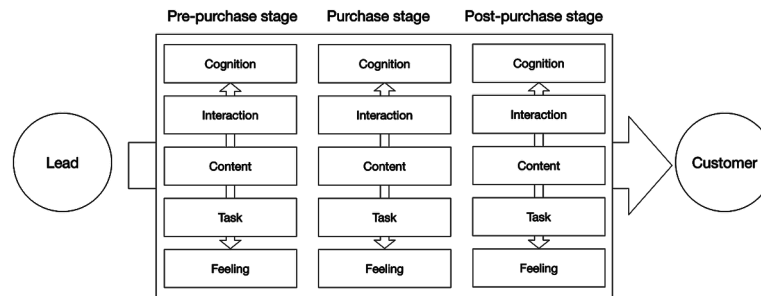
One hypothesis is that if friction becomes too high, customers may drop out at some point of the journey and switch to another brand or organization (which requires less energy for similar experiences), including circulating negative information after the initial purchase is completed. Each level of fluency is described briefly in Table 1, but each is described in more detail below.

Task Fluency vs. Friction

Consistent with theory on decision making processes, customers perform various tasks across their journey, ranging from highly cognitive efforts such as gathering information and evaluating/comparing products to simple ones such as making a payment or an online reservation. Customers are increasingly performing tasks across different channels and platforms, as well. For example, customers may use OpenTable to reserve a table at their favorite restaurant, but they might simply call via the phone to accommodate more specific requests, use a different app, or even use UberEats to request delivery. According to Wäljas et al. (2010), Shen et al. (2018) and Majrashi and Hamilton (2015), tasks fluency is defined as the capability of services and interfaces to synchronize tasks performed by customers across platforms and interfaces. In this chapter, the authors build on this definition and propose that customers experience friction related to tasks if, irrespective from the channel/platform used, it is difficult for the customer to complete a task in terms of the action itself or the time required to complete that action.

Content Fluency vs. Friction

Content fluency refers to continuity of information across the customer journey. A closely related term is information fluency, which originates from educational research in which scholars assess the ability of students to access, use, and evaluate information during online learning experiences (Bradford & Wyatt 2010, Lombard 2016). Disfluency can appear if content is distributed through different channels and people (e.g. disfluency occurs when customers are transferred from representative to representative during a phonecall). For example, customers might be overwhelmed with information about products, prices, services etc. at an early stage of consideration, but miss important information at a later stage during product evaluation or purchase decision. Misconceptions between customers and companies about what information has already been shared can lead to redundancy or sudden loss of information/content during the decision-making process. The framework presented in this chapter makes a distinction between friction related to content, which is about customer perception of the amount of information,

Table 1. Definitions of fluency in customer experience and examples of friction

Dimensions	Definition for Device/Platform Integration (Majrashi & Hamilton 2015)	Definition for Omnichannel Strategy (Shen et al. 2018)	Other Related Studies	Proposed Definition for Customer Experience (Pre-, Purchase, Post-Purchase Stage)	Possible Friction Experienced by Customers (Pre-, Purchase, Post-Purchase Stage)
Task fluency vs friction	Capability of services in supporting a task when users are carrying out a horizontal task	Capability of omnichannel services to enable online shoppers migrating and continuing on tasks across channels	Wäljas et al. (2010)	Capability of services in supporting customers to easily and timely complete a task within the customer journey	- Difficulty to complete a task - Requiring too much time to complete task - Sense of having not fully completed the task (too little time used)
Content fluency vs friction	Capability of cross-platform services to support continuity of reading or exploring the contents after switching from one platform to another.	Capability of omnichannel services to enable online shoppers accessing, exploring and easily finding contents across channels	Bradford & Wyatt (2010) Lombard (2016)	Capability of services to enable customers accessing, exploring and easily finding the right amount of contents within the customer journey	- Too much or too little information available - Too much or too little repetition / redundancy of information
Interaction fluency vs friction	Capability of services in supporting fluency of user interaction when users are carrying out a task cross-platform	Capability of omnichannel services to support online shoppers continuously interacting with services across channels	Cassab & MacLachlan (2006) Zeithaml et al. (2000)	Capability of services in supporting customers to continuously interact with company, person in charge or product / service, sufficient to carry out a task within the customer journey	- Too much or too little communication with the company / person in charge - Too little variety of options to contact the company / person in charge - Too little or too much freedom to evaluate a product/ service
Cognition fluency vs friction	Capability of services in helping users to remain in the same level of engagement after transition of the activity to another device	Capabilities of omnichannel services in helping online shoppers to remain in the same level of engagement and deal with the service after transition from one channel to another	Alter & Oppenheimer (2009) Chang (2018)	Capability of services in supporting customers to remain in the same level of cognitive engagement across the customer journey	- Difficulty to understand the information available - Too much or too little variety of options (of key decisions such as product, payment etc.)
Feeling fluency vs friction	Capability of services in helping users to remain in the same level of feeling after transition	Capabilities of omnichannel services in helping online shoppers to remain in the same level of feeling and satisfaction towards the service	Van Hagen & Bron (2014)	Capability of services in supporting customers to remain in the same level of emotional engagement across the customer journey	- Low level of positivity of communication and/or empathy by company / person in charge

Source: By author

and friction related to cognition, which is used as an indicator for how easy or difficult it is to process and understand the information. For example, customers might be satisfied with how much information is available, but still experience friction if the information is difficult to process or the explanations by service staff are confusing.

Interaction Fluency vs. Friction

Cassab and MacLachlan (2006) build on the concept of interaction fluency as a key process defined as the degree to which the firm's interfaces *facilitate flowing, effortless, and accurate interactions* (557). The quality of interaction in service encounters has a significant and positive effect on overall service

quality perceptions (Zeithaml 2000), and studies on online service encounters put emphasis on the importance of a company's responsiveness and ease of contact (Zeithaml et al., 2002). Customers expect that regardless of the used channel, platform, or point in time of their journey, they should be able to easily contact and interact with the company. This chapter proposes that customers experience friction related to interaction if it is difficult to contact the company or a representative (which can be related to opening hours, availability of staff, a bloated customer service phone line, etc.), and/or if they feel having too few options for contact. Fluent interaction is also necessary with the company's products and services, so that the customer can fully evaluate them during consideration and easily start using them after purchase. For example, too little freedom during a test drive of a car may frustrate customers who want to test specific features, or may cause problems later when driving the car after purchase. Having too much freedom (as a result of insufficient guidance by the salesperson) may make customers feel uncertain about what features to evaluate, making it difficult to compare car models at a later point in time. Friction in this case is often psychological and the result of frustration, rather than a clear pain point in the service process.

Cognition Fluency vs. Friction

Processing fluency is the subjective experience of perceived ease/difficulty in processing external information, and retrieval fluency is the ease/difficulty in handling perceived information recalled from memory (Chang, 2018). The framework presented in this chapter focuses on the former, as the goal is to propose a way to measure perceived fluency of touch-points which by definition require an external source and point of contact. Customers need to process external stimuli and information at each stage of their customer journey, requiring this information to be consistent and easy to deal with. It is therefore suggested that customers experience friction related to cognition if any information is difficult to process/understand or if an action requires too much mental effort to perform. For example, a customer might not understand various options for a car, or the customer might be angry that they have to add up the cost for various options themselves.

Feeling Fluency vs. Friction

According to Majrashi and Hamilton (2015), feeling fluency is the capability of services to provide emotional continuity. Van Hagen and Bron (2014) refer to an "emotional journey" that explains how customers go through positive, negative, or indifferent emotions from early preparation to final destination. The authors suggest that it is not necessary to maximize the satisfaction of customers on all aspects and in every touch-point throughout the journey, which is less effective and costly, but rather focusing on strengthening peak (high satisfaction) times and to end strongly. Customers experience friction related to feeling if the services are not continuously supporting the emotions a customer goes through when progressing through the journey. For example, customers might feel the happiest when they get into their newly purchased car, but an emotionless or task-oriented salesperson who is more focused on explaining car features could ruin the experience by withholding the keys. Regardless of the channels or people customers interact with, the company must maintain positivity of communication, show empathy, and approach things from the customer's point of view to avoid friction.

Suggestions on Metrics and Question Items

While friction is a key concept that can be easily applied to many industries and products/services, from education to social media to convenience stores, the automotive industry is used for an example through which its utility and possible metrics/methods can be demonstrated. The automotive industry is chosen for three primary reasons. Firstly, the purchase process of a car is highly structured, with clearly defined steps in each stage of the customer experience (e.g., sales talk and test drives in the pre-purchase stage, negotiation and pick-up of the car in the purchase stage, and follow-up maintenance or brand recommendations in the post-purchase stage). Secondly, as a Deloitte (2014) study demonstrated, car buyers are highly involved in the decision-making process, often spending a fair amount of time on the decision due to the high cost of the product and complexity of the buying process. Customers are therefore more likely to remember details about touch-points and the overall experience. This does not make friction more important, but it does make studying it more reliable. Finally, the authors have significant experience as consultants with the automotive sector, and thus can create a survey that is customized for relevancy to the industry. While a qualitative study might be useful for the purposes of exploring nuances for other sectors and industries (e.g., SMEs or nonprofit organizations), it is not necessary to conduct a full exploratory qualitative study in this case. Individual aspects of the customer journey that might serve as points of friction are abundant in the customer experience literature discussed above (e.g., Cassab & MacLachlan, 2006; Stein & Ramaseshan, 2016), as well as in scale books like Bearden, Netemeyer, and Haws (2011). They are adapted here for compatibility with the information technologies literature (e.g., Shen et al., 2018) into a survey that can gauge experience with fluency and friction across the entire customer journey.

Table 2 lists survey items to use for a questionnaire that address each of the five dimensions across the three purchase stages, resulting in 15 categories of questions. To assess these items, three types of scales are proposed to be used. First, a five point just-about-right scale ranging from far too little to far too much is used to measure the items in task, content and interaction. While some scholars criticize just-about-right (JAR) scaling for measuring attribute intensity and acceptability simultaneously, as well as a tendency for centering bias, using this scale for some of the dimensions of friction should prevent that results do not necessarily provide insights about acceptability (we cannot say for sure whether a consumer prefers low effort in all stages of the journey). The second type of scale is a five-point Likert scale ranging from very complicated/difficult to very simple/easy which is used for cognition (the level of difficulty), and the third is a five-point Likert scale ranging from very low to very high is used to measure feeling (the level of positivity/empathy). Five-point Likert scales were chosen because of four reasons. First, using the same number of selectable options across different scale formats limits additional respondent burden. Second, five-point scales facilitate practical application in terms of data analysis, reporting and visualization across the company. Third, research suggests that for indicators of customer sentiment such as satisfaction surveys, five and seven-point scales can easily be rescaled with the resultant data being quite comparable (Dawes, 2012). Fourth, due to the holistic approach to customer experience used in this study, there is often an extended amount of time between survey responses and participant experiences, making the nuance afforded by a 7-point scale suspect in terms of participants' memories.

The reason for using these three different scales depending on the dimension is that, contrary to customer effort in the context of CES, the goal is not to minimize effort, but to align it with customer needs throughout the journey. For example, redundancy of information may lead to frustration if information processed by the customer feels repetitive and unnecessary (e.g., a salesperson that reiterates

Table 2. Survey items for friction experienced during the customer journey

	Pre-purchase Initial Consideration, Test Drive and Car Evaluation	Purchase Negotiation, Paperwork, Picking Up the Car	Post-Purchase Initial Car Usage and Follow-Up	Measurement Scales
Task	• Time needed to gather information	• Time spent in the final negotiation and paperwork • Time spent picking up the car	• Time needed to resolve any unanswered questions	Far too little / too little / the right amount / too much /far too much
Content	• Amount of information available • Repetition of information encountered	• Amount of information received during the price negotiation • Amount of information (and repetition) received when picking up the car	• Amount of information received after the car delivery	Far too little / too little / the right amount / too much /far too much
Interaction	• Amount of communication with salesperson, dealer • Freedom to contact salesperson or dealer • Freedom experienced during the test drive	• Amount of communication with salesperson, finance and aftersales	• Opportunity to communicate with the dealer or company about unanswered questions and problems	Far too little / too little / the right amount / too much /far too much
Cognition	• Difficulty of understanding information about cars, purchase and financing options • Variety of options for car models	• Difficulty to choose model, financing options • Difficulty to do price negotiation and complete paperwork • Difficulty to pick up the car	• Difficulty getting help for any problems or unanswered questions • Difficulty to pay the bill	Very difficult / somewhat difficult / neither easy nor difficult / somewhat easy / very easy
Feeling	• Positivity of communication • Salesperson approaching things from customer point of view	• Positivity of communication • Salesperson approaching things from customer point of view	• Positivity of communication • Salesperson approaching things from customer point of view	Very low / low / neither high nor low / high / very high

Source: By author

simple details might sound condescending or uninformed about more complex features). On the other hand, strategic disfluencies can also be helpful and increase value for invested customers or processing important information (Cox & Cox, 2002; Motyka et al., 2015; Labroo and Pocheptsova, 2016.

Any items which receive responses of anything else than "just about right" (for task, content and interaction), and which receive low levels for simplicity, positivity, and empathy (cognition and feeling), suggest that customers experience friction at that stage of the customer journey. More importantly, analyzing the responses horizontally for each dimension would reveal whether there are significant changes in the values across the purchase stages, an indicator that customers experience friction over time across the entire journey. For example, customers may have access to "just about the right" amount of information at an early stage of considering a car purchase (e.g., via websites), but receive "too little" information and "too much" redundancy during the negotiation at the dealer, perhaps connected to "very little" empathy. Depending on what channels the customers have used, this could be an indicator that information is not shared effectively among channels. A look at the vertical distribution of friction would also reveal whether services outperform in terms of low friction for one dimension but not in another. For example, customers may be able to access "just about the right" amount of information across all stages of the decision process, but may have difficulties processing that information (cognition) or discussing them with the company or representative (interaction). This would also allow companies to have a stronger starting point for deeper forms of customer research like interviews or focus groups, focusing on specific key performance indicators (KPIs), target customer segments, etc.

MANAGERIAL IMPLICATIONS

Companies have a variety of options to collect and assess customer feedback, and technology has made it easier for management to track data in real time and share it with employees. The increasing complexity of customer touch-points, however, has made it challenging to keep track of the entire customer experience. Companies are increasingly hiring "Customer Experience Managers" (CEMs) whose responsibility is to plan, consistently deliver, and enhance the customer experience, but relevant KPIs are often still tracked by specific divisions within the company that might not communicate with each other. For example, CS data for the sales experience may be primarily tracked and analyzed by the sales department, while the service department focuses on loyalty scores and feedback for the after-sales experience. Top management has access to consolidated data (e.g., via marketing dashboards) for each function of the company, but understanding the interrelationships and dynamic nature over time of such data is still a big challenge. While sales might blame advertising for a drop in engagement, the problem could be in the purchase experience or even the social media conversations around repairs. This is even further complicated since surveys are often conducted by the relevant departments in an uncoordinated manner (at different points in time and for different samples), making it difficult to track customer feedback across the entire journey.

Managers should recognize that customer experience is a narrative flow and measure it in a way that it clearly shows how various touch-points over time interact and help/hinder customer progress through the purchase stages. However, companies still spend a great deal of time on the question how to "wow" customers with added services and promotions, instead of paying more attention to how decreasing friction in the experience might be a faster, easier, and cheaper solution. Addressing friction requires managers to strengthen interdisciplinary and cross-functional coordination across departments to design and implement improved customer experiences. It is not proposed that such a metric should replace existing ones, but rather that it would add an assessment layer that help managers to have a more integrated and interconnected view on customer touch-points.

RESEARCH LIMITATIONS

This study is subject to some limitations. First, the dimensions of friction have been developed based on a close examination of the existing literature in information processing, omni-channel media, and customer experience, and the resulting survey items and scales were further developed drawing from automotive consultancy experience of the authors and external reviewers. Validation through a confirmatory, quantitative assessment would further strengthen the framework.

Second, while the proposed dimensions are considered to be universal across industries, specific survey items would need to be customized due to industry-specific differences in the customer journey design and implementation. Further elaboration is required on how to translate the dimensions of friction to specific survey items that match each industry's requirements.

CONCLUSION

In a time of rapid customer interaction with both each other and companies, understanding customer experience has become critical. Previous research has focused mostly on specific elements related to customer experience, such as buying-behavior process models, relationship marketing, and customer engagement. However, studies on the continuity and consistency of experiences through the pre-purchase, purchase, and post-purchase stages are underdeveloped. How to properly measure customer experience in a way that takes an integrated view of the touch-points across the entire journey is a key research issue (Lemon & Verhoef, 2016).

This chapter reviewed common methods to measure customer experience, including customer satisfaction (CS), loyalty (NPS), and effort (CE), and argued that they are insufficient for the multi-channel, interconnected, time-based, and dynamic nature of customer touch-points. Therefore, a framework is suggested based on processing fluency theory to explain how customers may experience friction, or points of resistance, that make the customer journey less seamless and continuous. Based on previous work on fluency and using the example of the automotive industry, survey items are proposed across the five dimensions of task, content, interaction, cognition, and feeling to be assessed in each stage of the customer journey. Analyzing them horizontally (through time) and vertically (across dimensions) would help to uncover issues that make it difficult for customers to experience a brand seamlessly and naturally.

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KEY TERMS AND DEFINITIONS

Customer Effort: Mental and perceptual effort a customer must invest to get a problem solved in a service encounter.

Customer Experience: A multidimensional construct related to a firm's offering that triggers cognitive, emotional, and behavioral responses by the customer.

Customer Journey: A visual map of touchpoints modeled in the order they occur from the customer perspective and which create a continuous narrative when progressing through the purchase stages.

Customer Satisfaction: Customer's evaluation of a firm's offering (product, service, experience) against a standard.

Customer Touch-Point: Any point in time of the customer journey when customers perceive and/or engage in information, products, and services that are part of or related to a firm's offering.

Friction: Points of resistance that make the customer journey less seamless, continuous, and natural from customer's point of view.

Perceptual Fluency: The level of continuity and easiness/difficulty to perceive and process external stimuli, subsequently influencing judgments of the quality of the experience.

Processing Fluency: The level of easiness/difficulty of processing information.

Chapter 6
Customers' Generational Differences Regarding In-Store Shopping Experiences

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ABSTRACT

This chapter aims to identify customers' needs in regard to in-store shopping experiences and to examine these results with specific reference to generational differences between the senior and younger customers. This exploratory study followed a qualitative approach based on semi-structured interviews conducted through focus groups. Specifically, four sessions were organized with 24 Italian customers, of whom 12 were baby boomers and 12 were millennials, who were frequent visitors to retail stores to undertake shopping activities. The pleasure, arousal, and dominance (PAD) model was used to explain customers' needs in regard to in-store shopping experiences. The research contributes to the current literature on both a theoretical and managerial level. From a theoretical perspective, it identifies customers' needs in regard to in-store shopping experiences with particular attention devoted to the generational perspective. In managerial terms, this study provides retailers with suggestions on possible strategic paths to be taken to create a personalized in-store shopping experience.

INTRODUCTION

The increasing pervasiveness of technology and social media is revolutionising the retail industry (e.g., Grewal et al., 2017) and forcing retailers to consider effective strategies to gain competitive advantage (e.g., Kumar et al., 2017). This need is largely driven by the fact that increasing numbers of customers around the world are choosing to purchase products online through smartphones and tablets, by also spending important amounts for purchase of these products (e.g., Misra et al., 2017; Priporas et al., 2017). Consequently, both practitioners and retail management scholars are devoting more attention to online shopping experiences, rather than analysing how retailers can create positive experiences for their

customers in traditional channels. Thus, the following question arises: can retailers neglect traditional channels in favour of the web channel? The answer to this question is negative because stores are and will continue to be very important for customers because to go shopping in the store is something that customers cannot experience through other channels. Therefore, it is crucial that retailers invest in in-store shopping experience management.

The in-store shopping experience is not a new topic in retail management literature. Many scholars have examined this topic by focusing on specific factors related to shopping experiences in traditional channels (e.g., Bonfanti, 2017; Lemon & Verhoef, 2016; Pennington, 2016; Solis, 2015; Stein and Ramaseshan, 2016; Terblanche, 2018; Teufel and Zimmermann, 2015; Zentes et al., 2016), such as service quality (Terblanche & Boshoff, 2006; Xu-Priour & Cliquet, 2013), merchandise quality (Grewal et al., 2009; Terblanche & Boshoff, 2006), variety of assortment (Terblanche & Boshoff, 2006), product prices (Grewal et al., 2009; Terblanche & Boshoff, 2006), convenience (Sathish & Venkatesakumar, 2011), store environment design (Bagdare, 2013; Bonnin & Goudey, 2012; Castaldo & Mauri, 2017; Sachdeva & Goel, 2015), store atmosphere (Sathish & Venkatesakumar, 2011; Vukadin et al., 2016; Zaghi, 2014), emotions (Bagdare & Jain, 2013; Cachero-Martínez & Wzquez-Casielles, 2017; Sachdeva & Goel, 2015), personal interaction (Bagdare, 2013; Sathish & Venkatesakumar, 2011; Terblanche & Boshoff, 2004; Xu-Priour & Cliquet, 2013) and cutting-edge in-store technology (Adil & Khalid, 2015; Choi et al., 2015; Zagel, 2016). Therefore, the in-store shopping experience can result from many factors that can be traced from many different academic articles. These factors together create a personalised in-store shopping experience. To better understand how to generate this personalised experience, retailers can consider changes in shoppers' behaviours. More precisely, retailers can examine the development of customers' needs in relation to how they undertake their shopping. In addition, it may also be interesting to investigate the differences existing among different generations.

Specific research that investigates customers' needs in regard to shopping experiences is very limited. Thus, this chapter is motivated by the desire to explore whether there is evidence of generational differences in customers' perceptions towards in-store shopping experiences, given that customer expectations are fuelled by the progressive effect of their perceptions (Rust et al., 1999). The shopping experience concept is examined in specific reference to different generations – baby boomers and millennials – to consider the daily challenges and opportunities faced by store managers to create a personalised shopping experience. Consequently, this chapter aims to suggest which management strategies store managers can adopt to satisfy their senior and younger customers, retain these customers and increase sales. In this regard, after offering a background of the core achievements of research on the concept of customers' needs and providing details about the research method, this chapter presents the results from focus group interviews. Four focus group sessions were organised with 24 Italian (senior and younger) customers of retail stores. In addition, this chapter identifies which strategies can be undertaken to improve in-store shopping experience management in the digital era by providing a practical toolbox, as well as hints for future research, that will be beneficial for both researchers and practitioners.

From a methodological perspective, this chapter is the result of both conceptual study and different qualitative research methods. Specifically, in addition to theoretical evidence published in retail and service management and marketing literature on the shopping experience, this study employed focus group interviews as a specific method of explorative data collection, and performed content analysis to elaborate customers' needs in regard to the shopping experience.

The remainder of the chapter is organised as follows. First, a brief background is provided on customers' needs in regard to the in-store shopping experience. Following this, a research design and method

section is presented. After presenting and discussing the results, the theoretical and practical implications are provided. Finally, this study concludes with a discussion of the limitations and directions for future research.

CUSTOMERS' NEEDS AND EXPECTATIONS REGARDING THE IN-STORE SHOPPING EXPERIENCE

Customers' Needs and Expectations

Customer needs are fundamental prerequisites for delivering a service of ever-higher quality, satisfying customers and succeeding in retaining customers (Baccarani et al., 2010; Kotler, 2000, Ofir & Simonson, 2007). Needs and expectations are terms that can be used as synonyms, yet they encompass some substantial differences, as presented by previous studies conducted in the service management field. According to the attractive quality approach (Kano et al., 1984), customer needs can be divided into the following three categories of requirements:

- **Indispensable (Must Be):** Although these needs are implicit (that is, they are obvious and not expressly communicated), they should not be neglected, but rather guaranteed and controlled by the company because, although their fulfilment does not increase customer satisfaction, their partial or total absence creates a negative judgement of quality, thereby generating extreme dissatisfaction among customers.
- **One-Dimensional:** These needs are expected by customers who usually explicitly require certain services, and their satisfaction is proportional to the level of customer fulfilment. Customers are dissatisfied when these needs are not met.
- **Attractive:** These are essentially latent needs—that is, they are not expected by customers because customers are unaware of them (Goffin et al., 2010). Customers usually do not think or do not know that meeting these needs could be useful or rewarding for them. If these needs are not met, this does not lead to dissatisfaction. However, their fulfilment creates strong satisfaction or pleasure (Berman, 2005; Kim & Mattila, 2013). Given that latent needs are a complex mix, which includes the needs and expectations of customers (Carlgren, 2013), satisfying latent needs corresponds to exceeding expectations—that is, giving customers more than expected, and diverging from expectations in a positive manner.

Based on the above classifications, satisfying indispensable needs means meeting an appropriate level of service—that is, what customers consider acceptable. This is the minimum acceptable level of service that customers wish to receive without being disappointed (expectations regarding the appropriate level of service). In contrast, satisfying attractive needs means meeting a desired level of service—that is, what customers wish or hope to receive, or what they believe can and should be provided to them in relation to their personal needs.

This classification, known as the Kano model, enables a store to set priorities, whereby indispensable attributes have the highest priority in product and service development. If the indispensable requirements are already fulfilled to a satisfactory level, then improvements in one-dimensional and attractive requirements should be undertaken, which has a much stronger influence on customer satisfaction.

Identifying and offering attractive attributes can create more opportunities for product differentiation in the target market.

Otherwise, the 'expectations' term is used in customer satisfaction studies to indicate the predictions (or probabilities) made by a consumer about 'what is likely to happen during a transaction or an imminent exchange', while, in research on service quality, expectations are defined as customers' desires – that is, what service providers 'should offer', rather than what they 'would like to offer' (Parasuraman et al., 1988, p. 17). In other words, needs are subject to expectations (Chiu & Lin, 2004) – needs reside more deeply in the psyche and tend to be more subconscious and global, while expectations are more aware, accessible and specific in nature (Schneider & Bowen, 1995).

Customers' Expectations and (Dis)satisfaction in Regard to Shopping

Scholars have highlighted how the satisfaction (or dissatisfaction) of customers in regard to shopping depends on whether their expectations are confirmed or not. According to the (dis)confirmation paradigm (Oliver, 1980, 1997), customers compare their perceptions with expectations when they judge the service of a company (Parasuraman et al., 1991). If customer expectations are exceeded (confirmation case), they are satisfied (Oliver, 1981; Swan & Trawick, 1981) or even delighted (Arnold et al., 2005; Berman, 2005; Kim & Mattila, 2013; Oliver et al., 1997). However, customers are dissatisfied if the shopping experience is lower than their expectations (disconfirmation case) (Oliver, 1981; Swan & Trawick, 1981).

Customers usually base their expectations on aspects they consider important to their shopping activity even before visiting the store. For example, difficulty finding a car park near the store entrance, failure to move freely within the store, spending a lot of time trying to find the desired product, and experiencing non-positive feelings during the activity can negatively affect their expectations of shopping. Expectations before service delivery affect customer evaluations of service performance and satisfaction (Parasuraman et al., 1985). Some studies have found that, when customers have little or no actual experience, they rely on 'due' expectations that trigger regulatory reactions—that is, they rely on what they believe the service provider should provide them to meet their needs and wants, rather than relying on 'realistic' expectations, as they have not previously had actual experience (Woodruff et al., 1983).

In the retail setting, a customer could experience a shopping trip in a favourable or unfavourable manner, or even have an extraordinary or terrible experience (Arnold et al., 2005), based on the store design, store atmosphere, interactions with staff and information received about the store—for example, through word of mouth, the internet or social media (Bäckström, 2011; Bäckström & Johansson, 2006). In fact, customers live their shopping experience in a mostly contradictory manner. The shopping experience is lived as an infernal activity because of the time, financial and psychic resources required, yet is also a paradisiacal situation because it allows people to escape from reality and gratify and reward their ego, thereby positively influencing their state of mind and highlighting their social and economic status through the purchased products that communicate the image they wish to portray of themselves.

Customers' Expectations Regarding the Shopping Experience

Given that expectations of a shopping trip in a specific store may also depend on previous customer buying experiences (Theodoridis & Chatzipanagiotou, 2008), the gradual accumulation of customers' perceptions fuels their future expectations (Rust et al., 1999). Therefore, it is important to focus on customers' perceptions of their shopping experience in stores to examine their future expectations and needs.

In the retail management literature, this topic has received limited attention. The main contributions published in this field of analysis are briefly presented as follows. Through a field study and controlled experiment, Kumar (2005, p. 178) integrated the longitudinal aspects of post-purchase evaluation with multiple expectations to examine the competitive effect on customers of improving the service process in terms of perception of and satisfaction with waiting time. The effect of improving service process "may not be local to a retail firm and may propagate to its competitors through the service experiences of their shared customers". Further, through an empirical study based on different interviews, Ofir and Simonson (2007) found that expectations may prove to be a counterproductive activity: contrary to the standard hypothesis that expectations are confirmed or defeated based on any discrepancy between expectations and actual experience, their research revealed a tendency to disconfirm expectations stated before the consumer experience. The empirical survey conducted by Jain and Bagdare (2009) revealed the main determinants of the customer experience in the context of emerging retail stores by analysing customer expectations. In particular, the authors found that these determinants are environment, design, customer service, visual appeal, customer satisfaction, merchandise, convenience, visual-audio, services and value-added service. Finally, given that grocery retailers continually aim to satisfy customers, Esbjerg et al. (2012) developed a theoretical framework that integrated several lines of research within the paradigm of disconfirmation of expectations.

To contribute to extending the literature on needs in the retail context, this chapter presents the results of exploratory research designed to identify the needs of customers in relation to the in-store shopping experience, and, consequently, examine these results with reference to possible generational differences among the customers involved in the study. More precisely, this study investigated senior and junior customers. On the basis of the generational classification provided by ISTAT, seniors are called 'Baby boomers' and juniors are called 'Millennials' or 'Generation Y'. More precisely, baby boomers are people born between 1946 and 1965, and are a generation strongly oriented to work, career, political and civil commitment and independence, with a medium-high education. They are devoted to concreteness, have important economic resources and hold positions of prestige. Millennials are people born between 1981 and 1995 who are an eternally connected generation, are very receptive and open, have little interest in politics, are attentive to image and are tolerant.

RESEARCH DESIGN AND METHOD

In this study, customers' needs in regard to the in-store shopping experience were grounded in and emerged from the data through an inductive approach (e.g., Leitch et al., 2010). The choice to use this method was connected to the desire to holistically understand respondents' experiences that could not otherwise be attained (Kulik et al., 2012). The data collection occurred through focus group interviews of customers from various stores. This method is particularly suitable because it allows research to achieve the following advantages:

- Obtain a wide range of ideas and impressions about the subject, and understand the perceptions and attitudes of individuals towards a given phenomenon (Hines, 2000; Krueger & Casey, 2000)
- Capture people's attitudes and beliefs with reference to the topic examined (Byers & Wilcox, 1991)
- Gain more opinions in the short term

- Encourage participants to freely answer questions, and use storytelling to talk in a relaxed way (Riessman, 2008)
- Stimulate the group dynamics to activate forgotten details and to eliminate inhibitions that could otherwise discourage participants from disclosing information (Nieuwenhuis, 2007)
- Acquire in-depth information that may not be obtained in one-to-one interviews (Babbie, 2011).

Twenty-four Italian store customers aged between 23 and 35 (millennials) and between 54 and 70 (baby boomers) participated in semi-structured interviews organised in four focus group sessions (five to seven participants per focus group session) in December 2017 and April 2018. In particular, customers were divided into focus group generational sessions.

The participants in the focus group interviews were recruited through the snowball technique (Patton, 2002), through which it is possible to select the cases to be interviewed by starting with cases already interviewed. The choice of this sampling was made because it is suitable for small or unknown populations. The selection criteria were as follows: (i) voluntary availability to participate in the focus group; (ii) usual attendance at stores; (iii) the desire to undertake shopping activities personally; and (iv) usual use of technology devices, such as smartphones and tablets, during daily activities, though not necessarily for shopping online. Only those who had visited the stores with the intention of shopping at least once a week between 2017 and 2018 were included. The profile of the participants in the focus groups, presented in Table 1, indicated a limited number of males (37.5%) compared with females (62.5%), which is recurrent in previous studies on shopping experience (e.g., Blázquez, 2014; Bonnin & Goudey, 2012; Triantafillidou et al., 2017).

Each focus group session averaged about two hours and was moderated by introducing the topic and the purposes of the group discussion (Du Plooy, 2002), and assuring the participants that no answer was inappropriate and that privacy was guaranteed through anonymous and aggregate processing of the information provided. The moderator used an interview program to provide a structure and a logical flow to the group discussions. This program of interviews was developed by considering the needs inherent in the experience of purchasing in a store and the customers' perceptions of the shopping experience.

The interview protocol was articulated according to the following two sections: (i) to identify the needs of customers with respect to the shopping experience at the store, and (ii) to explore what customers expect from the stores in terms of future management of the shopping experience. The interview protocol has predicted that the moderator has requested information on a specific topic, that is, the shopping experience in stores, not using a technical language, as not all participants would be able to understand this language and adequately respond to the questions asked. Moreover, the moderator assured that everyone could express their opinion freely and equally, so that no individual person would dominate the other individuals. The participants discussed the theme of the shopping experience with complete freedom, being able to refer to any type of store, without having to distinguish between grocery and non-grocery stores. The participants were comfortably seated around a table in a social and informal context, and discussed the various topics by talking one at a time, in a random order, based on their experiences in the stores they visited. When the participants discussed a significant shopping experience, they were asked to use synthetic words to express their behaviour or attitude.

The focus group sessions were audio recorded, and later transcribed and checked for accuracy. To examine the data, content analysis was undertaken (Stemler, 2001) via Qualitative Solutions and Research (QSR) NVivo 11 software. Thematic coding of this material was inductively undertaken (Saldana, 2009) in relation to the research purpose. The coding was performed conservatively, given that it included only

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Table 1. Participants' profile to focus group interviews

Participant	Age	Gender	Marital Status	Occupation	Level of Revenue	Focus Group Session
Grazia	67	female	nubile	retired	middle	Baby boomers (first session)
Loretta	63	female	married	working	below average	
Lucia	69	female	married	working	higher than average	
Paolo	65	man	divorced	working	below average	
Patrizia	54	female	married	working	above average	
Silvana	70	female	widow	retired	above average	
Emma	56	female	single	working	middle	Baby boomers (second session)
Franca	64	female	married	working	middle	
Luigi	66	man	married	working	below average	
Mario	70	man	widow	retired	middle	
Roberto	69	man	married	retired	below average	
Rina	58	female	widow	working	higher than average	
Carlotta	30	female	married	working	middle	Millennials (first session)
Deborah	24	female	single	student	//////////	
Francesco	29	man	single	working	middle	
Marco	24	man	single	student	//////////	
Sabrina	34	female	single	working	middle	
Chiara	33	female	married	working	middle	Millennials (second session)
Claudia	31	female	single	student	//////////	
Davide	27	man	single	student	//////////	
Fabio	23	female	single	student	//////////	
Giulia	30	female	married	working	middle	
Giuseppe	25	man	single	student	//////////	
Simone	23	man	single	student	//////////	

what was explicit in the data. In other words, intentionality was not inferred in the data. The codes were clustered in more general analytical themes, which were used for the analysis. The themes that emerged were proposed by means of an analysis model identified within the retail management literature. This study particularly employed the pleasure, arousal and dominance (PAD) emotional state model—a model of environmental psychology developed by Albert Mehrabian and James A. Russell (1974) to describe and measure emotional states. This model has been widely used in retail settings (Donovan et al., 1994; Donovan & Rossiter, 1982; Turley & Milliman, 2000) and was suitable for this research because customers shop to satisfy both functional and emotional needs. Specifically, this model describes human perceptions and experiences of the physical environment in relation to three dimensions:

- Pleasure/displeasure: deals with whether the individual perceives the environment as enjoyable or not. It refers to the level at which a person feels good, happy or satisfied in a certain situation. While joy is a pleasant emotion, anger and fear are unpleasant emotions.

Table 2. Customers' needs according to the PAD model

	Baby Boomers	**Millennials**
Pleasure	need for hospitality need for skills and professionalism	need for competence and professionalism need for comparison
Arousal	need for novelty	need for immersion need for store's identity need for in store technology
Dominance	need for order and cleaning need for simplicity and immediacy need for freedom	need for order and cleaning need for freedom

- Arousal/no arousal: reflects the extent to which the environment stimulates the individual. It does not consider the intensity of the emotion, but the level at which a person feels excited, stimulated, alert, awake or active within a given environment.
- Dominance/submissiveness: captures whether the individual feels in control in the environment. It explains how much a person perceives to have control over the situation or feels free to act within the environment.

RESULTS

This section presents the findings of the focus group interviews under two main headings, in accordance with the objectives of the study. These two headings refer to baby boomers' needs in regard to the in-store shopping experience and millennials' needs in regard to the in-store shopping experience. Thus, a generational difference is provided. The needs that emerged from the focus group sessions are articulated in relation to the three dimensions of the PAD model.

Essentially, with regard to baby boomers, the inductive analysis of the data enabled identification of hospitality, order and cleaning, skills and professionalism, simplicity and immediacy, freedom and novelty as customers' needs during the in-store shopping experience. In contrast, the millennials who participated in this study highlighted the need for competence and professionalism, comparison, immersion, store identity, in-store technology, order and cleaning, and freedom during the in-store shopping experience. Table 2 summarises these results.

Baby Boomers' Needs in Regard to the In-Store Shopping Experience

The baby boomers who participated in this study fundamentally expressed the six following needs in regard to the in-store shopping experience: (i) need for hospitality, (ii) need for order and cleaning, (iii) need for skills and professionalism, (iv) need for simplicity and immediacy, (v) need for freedom and (vi) need for novelty. Each of these needs is presented below through the customers' experiences in relation to the three dimensions of the PAD model.

Pleasure

Need for Hospitality

When senior customers shop, they appreciate stores that offer them a service aimed at meeting the need for hospitality. More specifically, the respondents openly communicated during the focus groups that they wished the front office staff to be easily available, healthy, smiling and polite, kind, friendly, spontaneous and helpful, while the elements of the sales environment should include music, lighting, furniture, style and perfumes designed to be perceived positively by the customer. For example, Lucia stated:

When I go into a store, I like to be greeted by the staff and, if I am a regular customer, be recognised, as well as being treated with care.

Patrizia and Emma, who did not have the habit of shopping at the same store, stated, each with their own words, that if a shop assistant is kind and inspires sympathy, they return more often and willingly in that store.

Need for Competence and Professionalism

Another baby boomer need was competence and professionalism. In this sense, sales staff must be interested, strive to understand customers' needs, be empathetic and help customers during the purchase, as well as providing accurate, timely and truthful information. By summarising the opinions gathered by all the interviewees, it emerged from the focus groups that the staff of the store must be competent, helpful, kind and able to help the customer in a discreet and non-intrusive way during shopping. In particular, Roberto stated:

I do not appreciate that the staff is nagging during my shopping session.

Arousal

Need for Novelty

A particularly interesting finding was the need for novelty that emerged from the dialogue with the baby boomers. These customers wished stores to give them the opportunity to acquire information and increase their levels of knowledge to learn more about their interests. They also preferred stores that were different and not standardised. For example, Loretta stated:

I would like the staff, or more generally the retailer, to make me understand the value of certain products at a very high price, so I could possibly evaluate the purchase.

Moreover, Lucia stated:

When I will have time to waste in stores, I think I want to be pampered, I wish they offered me opportunities to learn something more about the products, with demonstrations or proposals for thematic investigation.

In different words, Lucia, Patrizia and Silvana affirmed to get excited when they find something unique and original from what they are used to finding in stores.

Dominance

Need for Order and Cleaning

Order and cleaning were widely appreciated by the baby boomers interviewed. For them, the order depended on the signage in the store, the layout and product display, as well as price visibility. Cleanliness was necessary in all shops, especially in dressing rooms. For example, Mario stated:

When I shop in large stores, which I frequent less often and therefore know little, I need to feel reassured by the presence of a clear and legible signage, from seeing the order in the store and clearly identifying the prices of products for sale.

Meanwhile, Grazia stated:

When I go to the dressing room of a store to try a product and see dirt on the ground, or the footprints left by those who preceded me because it was raining outside, I immediately go out of the dressing room without even taking off my shoes, and go out without buying anything.

Need for Simplicity and Immediacy

The baby boomers wished to easily locate their desired items in the store. They wished to locate products easily and quickly, find products on the shelf, have limiting waiting time at the checkout, receive rapid customer service and use fast payment methods. Overall, they required simplicity and immediacy. For example, Paolo said:

I want to complete my purchases quickly when I have little time available.

Need for Freedom

Strictly connected to the above need, the senior customers wanted freedom. They appreciated moving around the store and examining and trying products independently, without feeling under strict observation. They favoured a sensory shopping experience and curiosity. Luigi proposed this aspect:

I expect to be able to manage the shopping experience based on my time available. I want to complete the purchase quickly when I have little time or enjoy a pleasant experience when I have more time or when I enter the store not necessarily with the goal of buying something but just for leisure or to have a look.

Rina and Franca, with different words, added that they really like being able to browse and discover products that they did not have in mind or did not know before entering the store.'

Millennials' Needs in Regard to the In-Store Shopping Experience

From the focus group interviews with the millennials who participated in this study emerged the seven following needs in regard to the in-store shopping experience: (i) need for competence and professionalism, (ii) need for comparison, (iii) need for immersion, (iv) need for store identity, (v) need for in-store technology, (vi) need for order and cleaning and (vii) need for freedom. Each of these needs is discussed below according to the three dimensions of the PAD model.

Pleasure

Need for Competence and Professionalism

As with the baby boomers, the millennials also considered the need for competence and professionalism as fundamental. They highlighted the pleasure of meeting a professional and prepared salesperson, as well as interested and empathic staff who can propose and advise on products, with a certain speed. Essentially, sales staff must engage to understand customers' needs. In this sense, Francesco stated:

When I go to a certain store specialised in football goods, I adore that the sales staff understand my needs and give me the right shoe, regardless of whether it is more or less expensive. I like it when people advise me in my interest and not in their own, when they are real consultants, who are there to help me make the best choice, especially as regards the more complex products, such as a phone, a PC, a piece of furniture, a jacket or a jewel.

Simone added:

I prefer stores that offer me the opportunity to understand my needs to front office staff and ensure that I can advise you in the best way according to my needs. It is essential that the staff know how to answer my doubts and reassure me about the after-sales services and the quality of the product.

Giuseppe intervened by stating:

It often happens that the staff are absolutely incompetent and this does not tolerate it, especially if, instead of admitting their ignorance on the subject, they try to give clearly wrong answers, passing them by absolute truths. I would appreciate more a person who tells me: I do not know, but I inform and tell you. I do not demand that people know everything, but I do not even want to feel mocked. Thanks to the internet, it is easier to collect information before going to the store.

Sabrina presented this example:

I need trained and capable staff who know the products for sale. A negative example I experienced was when I found myself in a clothing store with a shop assistant who did not know what kind of fabric a dress was made of, and had no idea of colour matching. Even not knowing how to recommend clothes whose fit fits with a person's body is a reason for a negative shopping experience.

Davide stated:

Many times, I do not go to some shops because I know that the staff attack you as soon as you enter the store. I think that the staff should always be available to us, but should not leaf through the catalogue at the entrance to the store and should not propose a specific product right away, but maybe give a wide choice. I also happened to go to stores where the staff are missing, and, in that case, it is equally unnerving

Need for Comparison

In their shopping, the millennials tended to choose large stores, where the choice was wide and there was the possibility of making comparisons. As Marco stated:

I prefer to attend large stores because they are very assorted, the choice is wide and I have the opportunity to compare products and prices.

Fabio stated:

There is not a type of store that I attend in particular, but probably I prefer shopping centres because they allow me to choose, when I do not know exactly what to buy, among a wide range of shops and products.

Arousal

Need for Immersion

The millennials appreciated being part of the experiential context created in the store. This expectation arose strongly when the point of sale was a single brand. In this regard, Francesco discussed his experience:

It really excites me to enter an environment that can transport me to another dimension, which makes me experience a 360° experience. I entered a record store in Florence years ago and I felt like I was in an old recording room: you could take the CDs and listen to them in professional systems and then buy them. It was not a shop, but a world apart.

Need for Store Identity

The millennials highlighted the importance of the store's identity—that is, the store's ability to differentiate itself from its competitors and to offer customers a distinctive idea, which must also be represented in the sales environment through various features, such as the display of goods, music and atmosphere. In this regard, Claudia suggested:

The display of the products must be pleasant and consistent with the product sold and the identity of the brand.

Davide expressed this example:

It must be a not too chaotic environment, without music or light background music, which is possibly not just the latest radio trends. I think it would give a certain identity to the store and a precise idea of what it wants to do and does not represent a simple mass service.

Giulia stated:

I do not like it when the sales environment is too dispersive, and has a cold and impersonal appearance.

Need for In-Store Technology

The millennials highlighted that it would be fun to do something interactive in the store that enables them to integrate the usual online experience (wide assortment of products, presence or not of a boss, feedback and comparison) with the offline experience. For example, Carlotta stated:

I really like the idea of using the proximity to send coupon users or inform them of active promotions when you are physically near the store.

The millennials also wished to know in advance the presence of a certain product in a store, to receive simplified purchase choices and to experience reduced waiting times for service through the development of technology systems. Simone discussed his desire as follows:

I like the stores where there is an app available or other technological device that allows me to know, even before going to the store or once entered the store, if the product is available onsite or in which other stores in the chain it is possibly available.

In addition, they hoped for an ever-increasing number of sales stores that offer a 'click & collect' service, increasing interactivity in stores, and the possibility of reviewing their shopping experience while in the store. In this regard, Claudia stated:

I very much appreciate the click & collect service because it allows me to comfortably shop online, decide when personally to pick up the product purchased in the store, no longer having to waste time for delivery or late receipt of the goods, not having to incur additional shipping costs, thus resulting in a cheaper purchase mode, and choose a product in any shop and have it delivered to the nearest point of sale.

Dominance

Need for Order and Cleaning

Order and cleaning were also very appreciated by the millennials, especially women. They expressed both appreciation for a clean and tidy place, and profound disappointment with a dirty, untidy and careless environment. For example, Deborah stated:

To attract me immediately, inside must be organised and cleaned. The lack of these elements tends to generate a profound dissatisfaction in people.

Chiara added:

I just cannot see disorder and dirt in the rooms. When this happens, I want to leave the point of sale immediately.

Marco discussed his experience:

I prefer big stores to see all the product variants and to be able to compare them autonomously without referring to the sales staff, to whom I ask for help only sporadically. For this reason, it is useful that the store is ordered, the signs are clear and the characteristics of the product are as described as possible adjacent to the product itself.

Need for Freedom

The millennials also wished for the freedom to move around the store and examine and try products independently. For example, Deborah stated:

In some clothing stores that have many sizes exposed, but not all, I would prefer to have a support system available (e.g., tablet at the point of sale) that allows me to check the availability or not in stock of some products. In very large stores, where there are many customers and everything is very hectic, and waiting for a reply from a front office employee requires a certain amount of time, this need is even more important.

DISCUSSION AND IMPLICATIONS FOR STORE MANAGERS

Given that customers' needs and habits are changing according to changes in lifestyles and demographic trends (e.g., Deshwal, 2016), store managers must focus on marketing strategies to anticipate and respond to customer needs through services that can be perceived as a value offering for the customers themselves. In this regard, the results of this study propose a number of practical implications for managers who wish to create a personalised in-store shopping experience in relation to different generational needs.

This research highlights that the customers interviewed were essentially content to shop in stores. For both baby boomers (Ugolini, 1999) and millennials, shopping exclusively online is still very premature because it is difficult to shop without physically touching, viewing and trying certain products. After all, customers perceive the physical environment through their senses (Soars, 2009). This result supports the studies that argue that the physical channel is not intended to be replaced by online channels (e.g., Bonfanti, 2017; Terblanche, 2018) and that tangible elements are still very important for customers, regardless of age. Thus, managers must continue to invest in physical stores, without neglecting the importance that technology is assuming in stores (e.g., Grewal et al., 2017; Priporas et al., 2017). In fact, unlike the baby boomers, the millennials adopted the behaviour of the centaur consumer (Wind et al., 2002), which is specific to people who try products offline and buy them online, thereby ensuring the tangibility of the physical store and enjoying the discounts and speed of the virtual store. Therefore, this research proposes that stores offer the same promotions and discounts as online retailers in a way that curbs the opportunistic behaviour of those who try offline and buy online.

This research emphasises that the sales environment must be designed in such a way that customers can live a shopping experience in line with their perceptions and expectations, particularly acting on certain atmospheric variables in the store, such as music and lighting, and elements of store design, such as sales equipment, furniture, signage, layout and product display. All these elements play a crucial role from an emotional and cognitive perspective in favouring customers' approach to or avoidance of stores, and consequently stimulate or limit customers' propensity to purchase. Further, interactions with sales personnel are fundamental if stores are to anticipate the needs and expectations of the market, and create customer-oriented value and build emotional bonds to establish a relationship of trust.

More specifically, both baby boomers and millennials expressed the need for order and cleaning, as well as competence and professionalism when shopping in store. Moreover, it is no longer enough to offer appreciable and low-priced goods because small details contribute greatly towards customers' opinions of a brand. In terms of the appearance of the store, millennials attributed value to the brand identity, as it is also maintained in literature (e.g., Pattuglia & Mingione, 2017). Therefore, emphasising the elements that contribute to identity, even within the space reserved for sales, is important. A distinctive musical genre, a unique showcase and the use of colours in a distinctive and personalised manner enables customers to see the company's vision. Thus, a sales point would enjoy a huge competitive advantage if it enhanced its image through accurate and specific environment design. Customers no longer only consider the price and the goods sold, but also note how certain stores are different from other stores. Meanwhile, all customers interviewed, especially the millennials, still felt the need to be accompanied in the customer journey by competent staff. Professionalism and advice were considered essential and indispensable elements of a good shopping experience. Thus, overall, this study suggests that store managers should enhance the customer shopping experience by continually investing in store design and staff training.

Unlike baby boomers, the millennials interviewed placed great importance on technology. While the baby boomers expressed their perceptions and experiences in stores in relation to fundamentally physical environmental aspects, including relationships with sales staff, millennials also communicated the need for technology and, in this sense, a multichannel approach. Finding information about a store online, both before and after visiting the store, and being able to shop online on a reliable and provided website if the desired product is unavailable in the physical store are actions of integrated offline/online shopping that are important for millennials. Accordingly, store managers should not neglect this expectation that has developed among emerging generations.

Reading these results through the interpretative lens of the PAD model outlines some significant features. Considering the opinions gathered during the focus groups, some of the needs expressed differed between the two generations investigated. In particular, this study highlights that the baby boomers devoted more attention to the dominance dimension, followed by pleasure and then arousal, while the millennials focused on pleasure, followed by arousal and then dominance. This finding raises different practical implications. Stores whose main targets are baby boomers should try to create clean and orderly points of sale, where customers see all products on sale simply and immediately, can shop at speed, and can move freely around the sales environment. For this generation, the arousal dimension is less developed; however, for the few customers who expressed the need for novelty, it was very much expected in stores. This study suggests that store managers should plan the display of goods in a way that avoids confusion and presents some novel elements to attract customers' attention by engaging and intriguing them.

In contrast, millennials expressed the fundamental need for the pleasure dimension by highlighting that contact with competent staff and the opportunity to compare products and offers created a positive shopping experience and satisfied them. Unlike baby boomers, the millennials considered the arousal dimension crucial, by seeking emotional immersion, emphasising the role of technology, and discussing the possibility of shopping in a sales environment with a specific identity that can be absorbed by customers in the store. In practical terms, stores whose main targets are millennials should not limit the presence of staff in favour of technology, especially in shops where advice is essential, such as clothing stores, but should invest in higher training to ensure staff are more competent and professional. In addition, they should invest in the store environment by improving store design and atmosphere from an experiential perspective, and communicate better and more widely the store's identity. Essentially, store managers should focus on the emotions and emotional intensity they wish their customers to experience when shopping in store.

Satisfying the needs that this study has highlighted should become a daily practice for retailers in store management because customers expect to see these needs satisfied. Neglecting these needs may entail a negative evaluation of the store by customers through generating low or high dissatisfaction, and will likely move customers away from that point of sale towards stores that offer the satisfaction of their needs.

CONCLUSIONS, LIMITATIONS AND FUTURE RESEARCH DIRECTIONS

The purpose of this study was to identify customers' needs regarding the in-store shopping experience and to examine these results with specific reference to generational differences between older and younger customers. Given that this research was exploratory in nature, it followed a qualitative approach based on semi-structured interviews conducted through focus groups. Specifically, four sessions were organised

with 24 Italian customers, of whom 12 were baby boomers and 12 were millennials, who were frequent visitors to retail stores for their shopping activities.

Essentially, this study revealed that, although the digital transformation is profoundly affecting the way that customers do and will shop, there are reasons to continue to think about a future role for physical stores, especially in the direction of creation of experiences and sociality though the use of technology.

The generational analysis undertaken in this research indicated that, for all interviewees, the physical store is indispensable because it allows them to have both physical and relational experiences. The experience is physical because it enables them to view and touch products—an important aspect not only for shopping in clothing stores, but also for grocery stores. The experience is relational because it enables them to obtain services that are not possible online, such as assistance and personalised advice offered by sales staff.

This research contributes to the literature at both a theoretical and managerial level. From a theoretical perspective, it identifies customers' needs in regard to the in-store shopping experience, with particular attention devoted to the generational perspective. In managerial terms, this study provides retailers with suggestions on the possible strategic paths to create a personalised in-store shopping experience.

The results of this study were conceptually developed based on both the theoretical evidence contained in the retail marketing and management and service management literature, and the qualitative analysis provided by the focus group interviews. Therefore, its limitations are mainly connected to these research methods. First, the sample size of the study was relatively small. As a result, the results cannot be generalised and require further study in the future. Second, this study involved only Italian customers who were frequent visitors to retail outlets located in a particular region of Veneto, Italy. To be able to generalise the results, a quantitative empirical study conducted on a national and international scale could be undertaken. With a larger sample, more detailed analysis could be performed, highlighting any similarities and differences from a cross-national and cross-cultural perspective.

Third, a fundamental constraint of this work concerns the consideration of any type of physical sales point, regardless of its distribution form and product sector. In addition, in the survey, the needs and expectations were not distinguished—such as between the grocery and non-grocery sectors. Further study in this regard could provide interesting insights. Fourth, a limitation regards the decoding of the interviews and the subjective vision of the interviewees. It was subsequently not possible to provide an objective view of the topic. Finally, the analysis of the interviews could represent a limitation in terms of the transcription of the dialogue. Transcription, however accurate, provides only a partial account of the discourse because it does not consider the elements that are not purely linguistic, such as intonation, pauses, gestures, hesitations, tones, volume and speed.

All these limitations can be used to suggest future research directions. Given that this analysis only considered the customers' perspective and did not directly analyse retailers, it would be useful to determine the current retailers' perspective for the purposes of comparison. It would also be interesting to analyse the needs of customers—for example, by using the model of Kano (1984) to distinguish implicit (or indifferent), expected (or must be) and latent (or attractive) needs that are respectively considered by customers as obvious, expected and unexpected. After all, customers' expectations (and particularly exceeding them) are a key determinant of their consumption experience in terms of satisfaction, delight and loyalty (e.g., Ali et al., 2018; Kotler, 2000; Ofir & Simonson, 2007).

It would also be interesting to study the role played by in-store communications in creating a positive shopping experience that is appealing for baby boomers and millennials. In-store communications cannot be limited to providing commercial information (essentially about merchandise and services),

but should also be aimed at meeting those intangible expectations that influence experiential shopping to increase customer interaction and engagement.

This research only focused on comparing younger and older customers; however, in terms of generational differences, it would also be interesting to compare the differences among younger shoppers. The ISTAT classification distinguishes younger people in two categories: (i) millennials, who were considered for this study, and (ii) centennials, also called the Z generation or iGeneration (iGen), who were born after 1995 and are a generation of hyper-connected, multimedia, autonomous young people who aim at speed, are attentive to global problems and are able to manage a continuous flow of information. Future research could investigate and compare the needs and expectations of these two different generations.

Finally, given that the digital revolution has led to an increase in customer expectations and needs in terms of the shopping experience (Mathwick et al., 2002; Rosenblum & Rowen, 2012) through a preference to use more channels during shopping and adopt more exploratory purchases than do consumers who purchase from a single channel (Kumar & Venkatesan, 2005; Rohm & Swamina-than, 2004), it would also be interesting to analyse how the different generations rely on this multichannel approach.

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KEY TERMS AND DEFINITIONS

Attractive Needs: Customers usually are unaware of not expected needs. Customers do not think or do not know that meeting these latent needs could be useful or rewarding for them.

Baby Boomers: They are people born between 1946 and 1965. They are a generation strongly oriented to work, career, political and civil commitment and independence, with a medium-high education. They are devoted to concreteness, have important economic resources and hold positions of prestige.

Customer's Expectations: Predictions or probabilities that are aware, accessible, and specific in nature.

Customer's Needs: Needs that reside deeply in the customer's psyche and tend to be subconscious and global.

(Dis)Confirmation Paradigm: Customers compare their perceptions with expectations when they judge the service of a company. Confirmation paradigm happens when customer expectations are exceeded in terms of satisfaction or even delight. Disconfirmation paradigm happens if customers are dissatisfied.

In-Store Shopping Experience: It includes a set of sensory, cognitive/intellectual, emotional/affective, social and physical/behavioral elements that customers can perceive when they go shopping in the store.

Indispensable (Must Be) Needs: Implicit needs that customers consider as obvious and that they do not communicate expressly.

Millennials or Generation Y: They are people born between 1981 and 1995 who are an eternally connected generation, are very receptive and open, have little interest in politics, are attentive to image and are tolerant.

One-Dimensional Needs: Expected needs by customers who usually explicitly require.

PAD Model: PAD is a model of environmental psychology developed to describe and measure emotional states. More specifically, it describes human perceptions and experiences of the physical environment in relation to pleasure, arousal, and dominance dimensions.

Chapter 7
The Influence of Retailer Choices on Consumer Behaviors and Sales Productivity

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ABSTRACT

The aim of this chapter is to analyze the most relevant factors affecting retailers by investigating the relationships between store type, assortment level, customers' purchases, and sales productivity. Analyzing the dataset of the German retailer Rossmann through classification and regression tools, this work investigates what store type customers visit more often, what kind of assortment they prefer, and how sales profitability is affected by internal and external factors. Results show a tendency from customers to shop in smaller neighborhood markets rather than in the large shopping centers with extensive assortments, determining an increase in sales productivity in smaller size stores. Results suggest managers developing strategies for creating multiple retail formats in order to meet the diverse customers' tendencies in the today's market.

INTRODUCTION

The 2008 financial and economic crisis led to a reduction in consumption that affected retail sales. Consumers have become more rational in purchasing, actively seeking the best offerings in order to save money. For retailers it is more and more difficult to predict consumers' purchasing behaviors, to

be able to satisfy them and gain customers' trust and loyalty. Consumers spend time looking for the store that offers more advantages for a product, instead of making all their choices in the same store. In view of these significant changes, it becomes essential for retailers to identify which factors influence consumers' purchasing behaviors in order to plan their store strategies and increase sales productivity. The actual competitive retail environment is characterized by a growing heterogeneity of demand and by the proliferation of new retail formats, determining cross shopping behaviors by consumers - consumers change from a store to another according to their purchase needs and the attributes of each store (Bustos-Reyes and González-Benito, 2008). Consumers may switch on and off shopping mood without necessary explanation and avert.

The uncertainty of consumer preferences is difficult to predict. Investigating and then predicting the causality between the competition, assortment size, promotions, and sales productivity may give the clue for a retail manager what a tendency of consumers is and whether they will be faithful to the chosen store and its assortment.

Prior marketing literature focused on the role of the assortment size to define consumer's choice of a retailer although providing opposite findings. According to Broniarczyk et al. (1998), when choosing among assortments, consumers prefer the variety offered by larger assortments. Reduction of the category assortments appears to have little or no negative impact on sales; however, it could determine a loss of the store visits (Fox & Sethuraman, 2010). Other works, instead, show that consumers prefer smaller assortments because they are less confident in making choices when the assortment is larger (Chernev 2006, 2003a, 2003b; Iyengar & Lepper, 2000). This confusion is reflected in the trend of large retailers to use multiple retail formats in order to satisfy the different consumers' preferences (Reutterer & Teller, 2009; Ruiz-Real et al., 2016).

The aim of this work is to investigate the influence of assortment sizes and store type on consumers' purchasing behaviors, as well as the influence of internal and external factors on sales productivity. Using the data of a retail chain drug stores, this chapter investigates how assortment size and store type influence consumers' choices and what external factors - such as competition distance and school holidays - or internal ones - such as promotional strategies - influence sales productivity.

Modelling approaches for store planning are often based on demand forecasts. Usually, choice models are used to estimate demand based on actual customer behavior approaches (Borin & Farris, 1995; Borin et al., 1994). This work adopts a multiple method based on a mix of classification and regression tools to analyze secondary data of a drug retailer.

The chapter is organized as follows: firstly, the literature background regarding the relationships between store type, assortment size, customers' visits, retail environment and sales productivity is analyzed; secondly, the research hypotheses have been tested through statistical analyses of the Rossmann retail data; thirdly, the results have been discussed proposing the related solutions and recommendations; finally, the work ends with the conclusions, implications, limitations and emerging future research directions.

BACKGROUND

Store Type and Consumers' Behaviors

The choice of a store type is a critical decision for retailers. According to Nielsen (2015) , the various store can differ in sales area, category of products sold and operating systems (self-service versus customer service counter).

Store format is one of the most important variable as it determines a retail competitive structure. Store format is defined by González-Benito et al. (2005) as "broad, competing categories that provides benefits to match the needs of different types of consumers and/or different shopping situations" (p. 59). In their study, they point out that first consumers choose the store format for their shopping and then pick a particular store of that format, which indicates that there is greater rivalry within store formats (intra-format) than between store formats (inter-format). To satisfy requests from different buyers, retailers can opt for a uniform store format or for a varied store format. Flexibility allows retailers to cope with changes in demand. When drafting a store format, retailers have to consider the local community needs and see to it that architecture and set-up blend in with the surroundings (Kumar, 2005).

Literature suggests that store type might influence customers' choice of a store and their purchasing behaviors.

Consumers take into account how different kinds of offer (products and services) impact on the expected benefit and convenience when they choose a store type (Kamran-Disfani et al., 2017). According to several authors, the combination of benefits (both tangible and intangible) offered by each store influences customer's perceived utility in different ways as their utility functions differ (Cleeren et al., 2010; Solgaard & Hansen, 2003; Messinger & Narasimhan, 1997). Bhatnagar & Ratchford (2004) state that consumers opt for the store that reduces the perceived costs (product price, travel and consumer's storage cost).

As suggested by the service output theory (Coughlan et al., 2006) in the marketing channels literature, in line with the store choice literature, consumers base their decision in respect of what store to shop at not exclusively on product attributes or price. On the contrary, they compromise between those elements and service outputs (for example, the way a product is purchased) when they choose where to shop. The higher the service outputs level (such as customer service, reduced waiting time, information provision, spatial convenience) the more appealing to customers a store is. Customers are expected to go for the store that can potentially improve their overall experience (Kamran-Disfani et al., 2017).

According to Van Waterschoot et al. (2008), the choice of a store is linked to the information that customers collect about its products. According to the previous literature, we stated the following research hypothesis:

H1: The store type influences consumer purchasing behavior

Assortment Level and Consumer Behavior

Another important decision for retailers is the assortment planning, which refers to the selection of the subset of products to offer in order to maximize the profit. A retailer with multiple chain stores can plan its assortments for a single store when the demand varies between stores. To suit all local preferences,

regionalization and optimization of the store-level assortment are widely used in practice and lead to competitive advantages. The decision is made considering the trade-off between expensive, customized assortments in every store and inexpensive, identical assortments in all stores that neglect demand variation. Academic literature focused on establishing a single assortment for a retailer (Hübner & Kuhn, 2012; Mantrala et al., 2009; Shin et al., 2015). Other studies showed that a retailer could have a different assortment at each store (Kök et al., 2009).

In the endless debate on assortment levels often surfaces the dichotomy between "more-is-better" (Baumol & Ide, 1956) and "choice overload" (Iyengar & Lepper, 2000). The former states that large assortments benefit customers as they offer more opportunities to satisfy disparate customer preferences (Baumol & Ide, 1956). According to some studies, large assortments increase anticipated consumption utility and actual consumption (Khan & Wansink, 2004), likelihood of purchase (Koelemeijer & Oppewal, 1999) and the ease of comparing different options (Hutchinson, 2005). On the other hand, other studies show that large assortments are likely to decrease purchases (Iyengar & Lepper, 2000), reduce decision satisfaction (Haynes, 2009; Schwartz, 2000), and increase choice difficulty (Fasolo, Carmeci, & Misuraca, 2009). Recent studies show that the costs of choosing from a large assortment rise faster than its benefits when the size of the assortment increases. The result is an inverted U-shaped relationship between assortment size and choice satisfaction (Lenton, Fasolo, & Todd, 2008; Reutskaja & Hogarth, 2009; Shah & Wolford, 2007). In a related line of inquiry the authors (Chernev, 2003a; Chernev, Böckenholt & Goodman, 2015; Xu, Jiang, & Dhar, 2013) indicate that consumers might not be keen on making comparisons, and that could be a reason for the asymmetry between increase in costs and benefits when assortments size increases. Meta-analysis nevertheless shows that the U-shaped relationship between assortment size and choice satisfaction does not explain all of the variance (Scheibehenne, Greifeneder, & Todd, 2010). In addition, studies in related literatures prove that some consumers might indeed be more inclined to or interested in making comparisons (Kruglanski et al., 2000; 2013). Independently by the results obtained, the different authors agree on the influence that the assortment level exercises on consumer purchasing behavior:

H2: The assortment level influences consumer purchasing behavior

Retail Environment and Store Performance

Store performance can be measured by different tools that can be market-based or sales-based. A common used tool is sales productivity, which measures total sales per unit area (Kumar & Karande, 2000). It represents an indicator of the efficiency of a store's management explaining how the revenue is generated using the available amount of sales space. However, sales productivity can be affected by several factors of the internal and external environment (Harrauer & Schnedlitz, 2016). Using secondary data, Kumare and Karande (2000) observed that store performance is influenced by internal store environment (number of checkouts per square foot of sales area, non-grocery products sold, banking facility, openness of the store, doubles of manufacturers coupons) and external environment (total number of households and type of neighborhood). In past research, authors explained the influence of retail environment on store performance. The most relevant variables investigated were the atmosphere of the place in the sense of the creating an effort to build pleasant buying environment (Kotler, 1973), demographic changes and socioeconomic characteristics (Ghosh & Craig, 1983), the level of competition (Ghosh, 1984), the effect of promotions (Walters & MacKenzie, 1988). As the retail environment becomes more complex

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(Achrol, 1991) additional variables from the macro and micro retail environment must be considered when evaluating store performance. Scholars focus on financial economic crisis (Harrauer & Schnedlitz 2016), consumers changing needs, climate change and fuel price (Moretta Tartaglione et al., 2018) as external factors, and competition distance (Mintz & Currim, 2013), promotions (Christen et al., 1997; Haupt & Kagerer, 2012), store assortment, store size and store location (Keh & Chu, 2003; Korhonen & Syrjänen, 2004; Vaz et al., 2010) as the internal ones.

Since store performance depends on sales, which in turn depend on consumer purchasing behavior that we hypothesized above to be influenced by the store type, we formulate the following hypothesis:

H3: The store type influences the effects of internal and external factors on sales productivity

METHOD

To test the research hypotheses, this work adopts a multiple method based on a mix of classification and regression tools to analyze secondary data of a drug retailer.

Particularly, the classification tool Linear Discriminant Analysis (LDA) (Fisher, 1940; Loog et al., 2001) is used to test hypotheses H1 and H2. The aim of classification is to examine the belonging of data to specific groups on the basis of a set of attributes. The LDA classifier $\hat{\sigma}_k\left(2.3.1\right)$ is the linear function of observation x, where $\hat{u}\_k$ is the average of all training observations belonging to the kth class, $\hat{\sigma}^2$ weighted average of the sample variance for each K classes and $\hat{\pi}\_k$ is the proportion of the training observations belonging to the kth class (James et al., 2013).

$$\hat{\sigma}_k\left(x\right) = x * \frac{\hat{u}_k}{\hat{\sigma}^2} - \frac{\hat{u}_k^{\,2}}{2\hat{\sigma}^2} + \log\left(\hat{\pi}_k\right)\left(2.3.1\right)$$

LDA is generally used when populations are multivariate normal and all different groups have equal covariance matrices (James et al., 2013). In this work, this tool is used to classify the high-dimensional dataset by clustering customers in relation to store type and assortment they prefer, according to the variables indicated in Table 1.

To test hypothesis H3, Multiple Linear Regression (MLinR) is used to detect the influence of internal and external factors on the sales productivity (Table 2) for each cluster detected with LDA. Running the regression on different aggregates of large data provides a clearer connection between the predictors and the outcome, thus increasing the statistical significance (Cook et al., 2002).

Data Collection and Descriptive Analysis

Data about 1,115 drug stores of Rossmann retailer located in Germany were collected online covering the period from 1 January 2013 to 31 July 2015 with the permission for use from the management who provided additional information for the purpose of this research. Data concerning the following variables were collected on a daily basis: Sales, Customers (the number of customers who visited the store), Store type, Assortment level, Size key (size of the store), School holidays, National holidays,

Table 1. Relevant categorical variables

Assortment	Basic- articles of personal hygiene, cleanings products, baby and family care etc.
	Extra - Basic more fresh products
	Extended – Extra more toys and extended household products
Store type	Neighborhood market
	Train station store
	Shopping Centre
	Retail park
Net sales area (square meters)	< 200 - <900
	<300 - <800
	<300 - <1000
	<300 - <900

Source: Authors' elaboration

Competition distance and Promo (the store takes part in promotions) or Promo2 (the store doesn't take part in promotions).

Table 3 shows the range of each variable in data with maximum and minimum values, mean, median and the count of missing values. Because of the large sample, a large dispersion in variables emerges. Based on the mean, data appear normally distributed with the exception of Competition Distance affected by extreme values, which have been corrected before continuing the analysis.

Since the focus of the research is on store type and assortment level, time variables (Day of week and Date) were not included in the analysis. The same occurred for the data about National Holidays because there was missing information about it in the dataset.

Table 4 shows the frequency of data by the net sales area of the store. The most frequent sizes of net sales area range from 500 to 700 sqm representing 70.8% of the dataset, while 25.8% of the dataset are net sales area from 200 to 400 sqm and 5.7% belongs to the range from 800 to 1000 sqm. By visualizing them in relation to the type of retail store (Figure 1), it emerges that Neighborhood markets have the most presence in the size from 200 to 400 sqm, while Retail Park and Shopping Centre have from 500 to 1000 sqm of net sales area. The Train station store appears principally in the range from 300 to 800 sqm of net sales area.

Table 2. Relevant continuous and dichotomous variables

Internal Factors	
Sales productivity	Daily sales turnover for sales area
Promo	Ongoing promotions on the day of the observation
Assortment	Assortment level of the store: basic, extra, extended
External Factors	
Competition distance	Distance in meters to the nearest competitor store
School holiday	Closure of public schools on the day of the observation

Source: Authors' elaboration

Table 3. Summary statistics of retail data (Rossmann drug store chain)

Store	Day of the Week	Date	Sales	Customers	Promo2
Min.: 1.0	Min.: 1.000	Min.: 2013-01-01	Min.: 0	Min.: 0.0	Min.: 0.0000
1st Qu.: 280.0	1st Qu.: 2.000	1st Qu.: 2013-08-17	1st Qu.: 3727	1st Qu.: 405.0	1st Qu.: 0.0000
Median: 558.0	Median: 4.000	Median: 2014-04-02	Median: 5744	Median: 609.0	Median: 1.0000
Mean: 558.4	Mean: 3.998	Mean: 2014-04-11	Mean: 5774	Mean: 633.1	Mean: 0.5006
3rd Qu: 838.0	3rd Qu.: 6.000	3rd Qu.: 2014-12-12	3rd Qu.: 7856	3rd Qu.: 837.0	3rd Qu.: 1.0000
Max.: 1115.0	Max.: 7.000	Max.: 2015-07-31	Max.: 41551	Max.: 7388.0	Max.: 1.0000
NA	NA	NA	NA	NA	NA
National holiday	**School holiday**	**Size key**	**Competition distance**	**Promo**	
Min.: 0	Min.: 0.0000	Min.: 1.000	Min.: 20	Min.: 0.0000	
1st Qu.: 0	1st Qu.: 0.0000	1st Qu.: 4.000	1st Qu.: 710	1st Qu.: 0.0000	
Median: 0	Median: 0.0000	Median: 4.000	Median: 2330	Median: 0.0000	
Mean: 0	Mean: 0.1786	Mean: 4.519	Mean: 5430	Mean: 0.3815	
3rd Qu.: 0	3rd Qu.: 0.0000	3rd Qu.: 6.000	3rd Qu.: 6890	3rd Qu.: 1.0000	
Max.: 0	Max.: 1.0000	Max.: 9.000	Max.: 75860	Max.: 1.0000	
NA's: 31050	NA	NA's: 2826	NA's: 2642	NA	

Source: Authors' elaboration

Table 4. Frequency of net sales area (Size key variable)

Net Sales Area (sqm)		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	*<200*	6226	.6	.6	.6
	<300	73542	7.2	7.2	7.9
	<400	156504	15.4	15.4	23.3
	<500	282127	27.7	27.8	51.1
	<600	213944	21.0	21.1	72.2
	<700	224740	22.1	22.2	94.4
	<800	45422	4.5	4.5	98.8
	<900	10178	1.0	1.0	99.8
	<1000	1700	.2	.2	100.0
	Total	1014383	99.7	100.0	
Missing	System	2826	.3		
Total		1017209	100.0		

Source: Authors' elaboration

From the analysis of the relationships between net sales area and level of Assortment (Figure 2), it is possible to observe that Basic assortment occurs mostly in the range from 300 to 500 sqm, while Extended and Extra assortments occur in the range from 600 to 1000 sqm. However, the Extra assortment does not have a high incidence in the dataset, hence the focus of the analysis will be only on Basic and Extended assortments.

Figure 1. Relationship between Size key and Store type
Source: Authors' elaboration
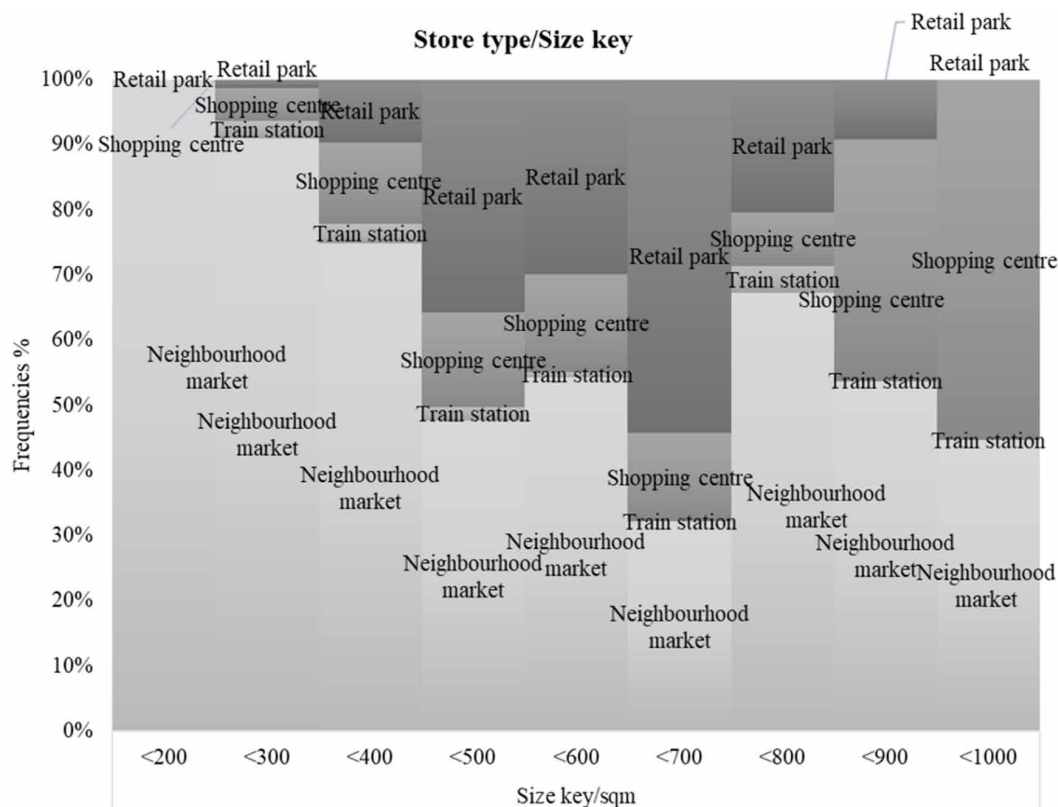
With regard to the relationship between store type and assortment level in data, Table 5 shows how many times each type of Assortment occurs within each type of Store. While Basic assortment represents the major assortment level in Neighborhood markets (62.8%) and in Shopping centers (52.2%), Extended assortment is mainly present in the Train Station stores (6.0%) and Retail parks (63.7%).

FINDINGS

Data have been clustered with the aim of understanding the trends of customers in visiting different store types using the classification tool LDA, which gave the best model fit in comparison with other classification tools like QDA and MLogR.

By clustering the dataset by store type (LDA1) (Tab. 6), it emerges that 55% of training observations belongs to Neighborhood markets, 13% to Shopping centers and 32% to Retail parks. Cluster's averages (Group means) reveal that average sales are higher for the type Retail Park than for Neighborhood market and Shopping Centre, while average of customers' visits is higher for the Neighborhood market than for Shopping Centre and Retail Park. Competition distance is lower for Shopping Centre than for the other two clusters, while School holidays and Promotions are similar in each cluster.

Figure 2. Relationship between Size key and Assortment type
Source: Authors' elaboration
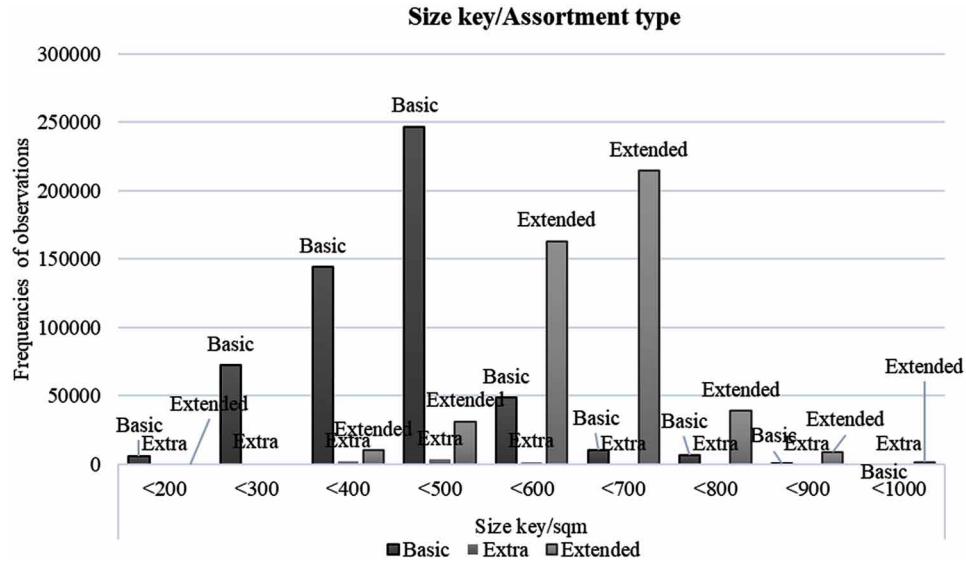
Table 5. Relationship between store type and assortment level

			Assortment level			Total
			Basic	**Extra**	**Extended**	
Store type	Neighborhood market	Count	345447$_a$	0$_b$	204296$_c$	549743
		% within Store format	62.8%	0.0%	37.2%	100.0%
	Train station store	Count	6594$_a$	8294$_b$	942$_c$	15830
		% within Store format	41.7%	52.4%	6.0%	100.0%
	Shopping Centre	Count	70878$_a$	0$_b$	65020$_c$	135898
		% within Store format	52.2%	0.0%	47.8%	100.0%
	Retail park	Count	113584$_a$	0$_b$	199328$_c$	312912
		% within Store format	36.3%	0.0%	63.7%	100.0%
Total		Count	536503	8294	469586	1014383
		% within Store format	52.9%	0.8%	46.3%	100.0%
Each subscript letter denotes a subset of Assortment categories whose column proportions do not differ significantly from each other at the .05 level.						

Source: Authors' elaboration

Table 6. Summary of Linear discriminant analysis (LDA1)

Store Type	Prior Prob	Sales	Customers	School Holidays	Competition Distance	Promo	Extended Assortment	Size Key
Neighborhood market	0.547	5599.643	616.666	0.165	3701.03	0.382	0.283	4.034
Shopping Centre	0.131	5351.198	615.836	0.166	2793.277	0.3811	0.502	4.812
Retail park	0.320	5651.974	480.290	0.163	5943.896	0.382	0.615	5.014

Source: Authors' elaboration

The analysis has been repeated to check the sales productivity by store type (LDA2) by replacing the variable Sales with Sales per square meter (Tab. 7). The results show that the higher productivity occurs for the Neighborhood market type, and the lowest for the Retail park.

By clustering the dataset by level of assortment (LDA3) (Tab. 8), it emerges that 58% of training observations belong to the typology "basic assortment", while 42% belong to the "extended assortment". The model dismissed the "extra assortment" due to missing information in data. Average Sales productivity and average Customers are higher for Basic assortment than for Extended assortment, while average Competition distance is higher for Extended assortment. Promotions and School holidays are constant in both clusters.

In order to investigate the influence of internal and external factors on the sales productivity, Multiple linear regression (MLinR) has been performed on the three stores' clusters: Neighborhood market, Shopping Centre and Retail Park. In Table 9 the output of the three MLinR models are illustrated outlining parameter estimates (β) and (t) - test statistics. There is the absence of multicollinearity in each model given by low VIF (variance inflation factor). For Neighborhood markets, adjusted R^2 shows that 65% of the variance in Sales productivity is explained by the linear combination of internal variables (Extended assortment, Customers and Promo) and external variables (Competition distance and School holiday). The most significant relationship occurs between Promo, School holidays and Sales productivity, meaning that if the store applies promotional discounts during school holidays the sales productivity increases significantly. Still positive and significant, but less strong, is the relationship between Customers, Competition distance and Sales productivity. A negative and significant relationship emerges instead between extended assortment and sales productivity, showing that increasing assortment level negatively influences sales productivity in Neighborhood markets. For Shopping centers, Adjusted R^2 shows that 85% of the variance in outcome is explained by displayed variables. In this case, the most significant and positive relationship is between Promo and Sales productivity, while no significant relationship emerges between School holidays and Sales productivity. Like for Neighborhood markets, also in this

Table 7. Summary of LDA2 considering Sales productivity (sales per square meter)

Store Type	Prior Prob	Sales Productivity	Customers	School Holidays	Competition Distance	Promo	Extended Assortment
Neighborhood market	0.547	1513.813	617	0.165	3701.03	0.382	0.283
Shopping Centre	0.131	1184.443	616	0.166	2793.277	0.3811	0.502
Retail park	0.320	1170.535	480	0.163	5943.896	0.382	0.615

Source: Authors' elaboration

Table 8. Summary of LDA3 considering Sales productivity (sales per square meter)

Assortment type	Prior probabilities	Sales productivity	Customers	Competition distance	School holiday	Promo
Basic	0.581	1568.466	574.972	3826.702	0.164445	0.381471
Extended	0.418	1071.584	569.9068	4958.157	0.166373	0.383167

Source: Authors' elaboration

Table 9. Parameter estimates for the clusters by store format (Outcome-Sales productivity)

Store type	Neighborhood market		Shopping center		Retail park	
Parameters	β	t	β	t	β	t
Intercept (β_0)	176.35	43.31***	55.34	13.23***	173.53	60.88***
Extended assortment	-683.96	-206.72***	-270.20	-85.73***	-296.51	-155.08***
Customers	1.22	226.23***	1.70	267.18***	2.47	423.92***
Promo	483.63	144.45***	227.61	70.514***	192.29	91.62***
Competition distance	0.00023	8.32***	0.03	49.17***	0.0014	7.79***
School holidays	36.02	8.45***	0.67	0.169	7.58	2.99**
Adjusted R^2	**0.646**		**0.853**		**0.837**	
VIF (range)	**(1.02-2)**		**(1.03-2.51)**		**(1.01-2.67)**	
*** p-value ≤0.001 significance of parametric (linear) relationship ** p-value ≤0.01 * p-value ≤0.05 . p-value ≤0.1						

  Source: Authors' Elaboration

case the relationship between Customers, Competition distance and Sales productivity is significant and positive but lower and the relationship between Extended assortment and Sales productivity is negative. This similar situation is presented in Retail parks where Adjusted R^2 shows that 84% of the variance in Sales productivity is explained by the displayed variables.

In a second phase, the influence of internal and external factors on sales productivity has been calculated considering the assortment levels. Table 10 displays the set of parameters of the MlinR models regarding the two clusters: basic and extended assortment. With regard to Basic assortment, all predictors, except Competition distance, show a positive and significant relationship with sales productivity.

Table 10. Parameter estimates for the clusters by assortment level (Outcome-Sales productivity)

Assortment type	Basic assortment		Extended assortment	
Parameters	β	T	β	t
Intercept (β_0)	-2.71	-0.728	-66.24	-27.67***
Customers	1.44	259.02***	1.34	366.43***
Promo	472.79	145.45***	245.8	128.58***
Competition Distance	No significant		129.9	75.15***
School Holidays	28.48	7.23***	20.71	8.91***
Adjusted R^2	**0.642**		**0.776**	
VIF (range)	**(1.02-1.92)**		**(1.02-2.12)**	
*** p-value ≤0.001 significance of parametric (linear) relationship ** p-value ≤0.01 * p-value ≤0.05 . p-value ≤0.1				

  Source: Authors' elaboration

Adjusted R^2 shows that 63% of the variance in sales productivity is explained by Customers, Promo and School Holidays, following the absence of multicollinearity given by low VIF (variance inflation factor). For the Extended assortment cluster, all predictors have a positive effect on sales productivity of stores. In this case, the sales productivity is influenced also by competition distance meaning that the increasing in competition distance improves the sales productivity of all types of stores with extended assortment.

DISCUSSION

The results obtained by the classification and regression analyses provide interesting evidences for testing the initial set of hypotheses.

By comparing customers' visits in the three considered store types (Table 7), it emerges a clear preference of customers for Neighborhood markets and for Shopping centers. However, considering the sales productivity (Table 8), it results significantly greater in Neighborhood markets. This means that, at equal visits, consumers tend to buy more in these stores. This result could depend on the fact that while shopping centers are places of leisure in which people go also just for walks, spend time and take a look at the products inside the stores, in Neighborhood markets people go only and exclusively when they need to buy something. Therefore, it is more frequent that in these stores the visits turn into purchases. Since it is possible to identify a clear correlation between the type of store and the purchase trends of consumers, we can state that the first hypothesis can be accepted:

H1: The store type influences consumer purchasing behavior

The results of the model LDA3 (Table 8) show that stores with basic assortment have a greater number of visits and major sales per sqm than stores with extended assortment. One reason supporting these results could be that basic assortment takes the most part in Neighborhood markets and Shopping centers, which, as showed above, are those with the greatest number of visits and higher sales productivity. On the other side, literature support these results with studies on decision-making according to which consumers have some difficulties in making a choice when a large assortment is provided (Chernev, 2006). Variety in the large assortments creates uncertainty in customers' decision-making decreasing the will to purchase (Broniarczyk & Hoyer, 1998). The negative effects of large assortments stem from consumers' aversion to making comparisons (Chernev 2003; Chernev, Böckenholt, & Goodman 2015; Shugan 1980; Xu, Jiang & Dhar 2013). Regardless of the causes or the sign of the relation between assortment and customers' choices, the results clearly show a correlation between assortment level and purchasing trends of consumers, thus validating the second hypothesis:

H2: The assortment level influences consumer purchasing behavior

Once the factors influencing consumer-purchasing behaviors are understood, it is important to identify the main external and internal factors that affect productivity of sales (Tab. 9).

Among the internal factors affecting sales productivity, adoption of promotional strategies is the most relevant as it increases productivity for each type of store and shows greater positive effects than other positive factors such as number of visits. While the most significant negative internal factor is the presence of an extended assortment that seems to decrease productivity of sales for each type of store.

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These results also support the second hypothesis. Customers may be motivated by extended assortment to visit the drug store in shopping centers and retail parks but the decision to purchase may not be made for the same reason. Iyengar and Lepper (2000) discussed that customers are initially attracted by the amount of products on the shells but due to decision difficulty consumers felt demotivated and regretful to make a choice, leaving the store without purchasing. They are likely to purchase in a store with basic assortment, preferably located in the neighborhood. The reasons may be the daily habits and past shopping experiences they have in drug stores.

With regard to external factors, competition distance shows to be positively related to sales productivity in every case but the relation is not so strong. Different relations can be observed when examining the influence of opening during school holidays on sales productivity. During the period of school holidays, positive and significant increases in sales productivity are observed for the Neighborhood markets and, more weak but still positive, for Retail parks. School holidays have, instead, no effects on sales productivity of Shopping centers.

The summary of the internal and external effects on sales productivity of the three different store type are presented in Table 12.

Since for each store type the effects produced by these factors appear homogeneous within the cluster but, in some cases, dissimilar among the different store types, the third hypothesis can be accepted:

H3: The store type influences the effects of internal and external factors on sales productivity

CONCLUSION

Today, thanks to on-line transaction processes and barcode scanning, massive data warehouses are created to support decision-making in complex retail environments (Pal, 2018). However, due to increasing market chaos, new tools for data analyses are necessary to extract the needed information and try to maintain complexity in an efficient way (Moretta Tartaglione et al., 2018). Understanding retail customers in terms of the store type and assortment level they prefer, as well as their behavior in different situations, becomes one of the main issues for retail managers to build strategies at many levels. In this context, classification and regression tools permit to analyze large samples by creating clusters and facilitating the interpretation of data. The results of this study show that consumers prefer to shop in neighborhood markets that offer a limited assortment. These stores in fact show the highest level of sales profitability,

Table 12. Summary of the internal and external effects on the sales productivity by the store type

Store type		Neigbourhood market	Shopping center	Retail park
Factors				
Internal factors	Extended assortment	Decrease	Decrease	Decrease
	Customers visits	Low increase	Low increase	Low increase
	Promo	Increase	Increase	Increase
External factors	Competition distance	Low increase	Low increase	Low increase
	School holiday	Increase	No effect	Low increase

Source: Authors' elaboration

especially during promotions and school holidays periods. However, retailers can not disregard other types of stores, like stores in shopping centers and retail parks, which, while generating lower sales profitability, are those that consumers prefer to visit. These stores thus become an important showcase to increase the visibility of a retailer and make products known to consumers. Therefore, the best solution for retailers is to adopt multi-channel formats. Rolling out more store types by a big retailer there are two important benefits: (1) the convenience of Neighborhood markets allows to attract consumers who generally buy at shopping centers for occasional and rapid shopping; (2) stores in shopping centers allow exploiting the great number of visits to increase visibility and gaining a better negotiating position with suppliers.

When organizing the different types of stores, a retailer should plan the level of the assortments according to the specific objectives of each store. The results of this study show that basic assortments stimulate sales, so they should be planned for local stores where the goal is to increase sales profitability. More extended levels of assortment could instead be planned for shopping centers where the main objective is to increase visits and show products independently of sales. However, too extended assortment levels have negative effects in any type of store. Regardless of the type of store, retailers should always have periods of promotions because they are the most influential factor in sales productivity, while less attention can be given to the distance from the competition that does not result as a very influential factor.

The main limitation of this work is the lack of some information in the dataset and the analysis carried out on a single retailer and in a single country. The validity of the results can not therefore be generalized. Future research could be aimed at repeating the investigation for other retailers or countries and compare the results.

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KEY TERMS AND DEFINITION

Assortment: A display of goods or services that a retailer provides to the customers.

Classification Method: A model that yields optimal discrimination between several classes in terms of predictive performance.

Neighborhood Market: A store adapted to satisfy the needs and wants of local surroundings. Net sales area: 200-800 sqm.

Preference: Customer's attitude towards a set of goods or services reflected in a decision-making process.

Retail Park: Unenclosed complex retail format of big and small retailers with a surface area from 20,000-55,000 sqm (in the chapter: the drug store located in a retail park with net sales area 500-1000 sqm).

Sales Productivity: Sales per unit area – the effective measure of generating store's revenue using the available amount of sales space.

Shopping Center: Large retail format of interconnected shops that enables the customer to walk from one to another. Net sales area: 500 - 1000 sqm.

Store's Visit: The traffic of customers inside the store.

Chapter 8
Effect of E–Retail Product Category on Performance

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ABSTRACT

Literature on product categorization of e-retail products has adopted a consumer view and studied the direct effect on consumer-level variables such as purchase intent or customer satisfaction. In doing so, the moderating effect of product categorization of e-retail products on firm-level variables has been ignored. To address the implications of e-retail product categorization, this chapter asks the following question, What is the moderating effect of e-retail product category on sales performance? This chapter uses concepts of information economics, e-retailing, and the search-experience-credence (SEC) categorization of products to develop theoretical hypotheses. Using data from 500 US e-retailers, this chapter contends that the ease to evaluate retail products online has a positive effect on sales volume of e-retail firms. This effect is the result of increased web traffic and decreased conversion rates, which describes the e-retail market behavior with firm-level variables.

INTRODUCTION

Revenue from e-commerce is expected to reach US \$2.7 billion by 2023 according to Statista (2019). It forecasts a 9% of average yearly growth rate. Li et al. (2017) explains that cross-channel strategies and new product categories shape this growth and the competitive dynamics of e-commerce. Nielsen (2017) reports Fast-Moving-Consumer-Goods (FMCG) will drive future growth in product categories such as grocery, fashion apparel, and personal care. However, there is a lack of research on how the product categories managed by e-retailers have an impact on the e-retail markets.

Product categories have an influence on e-retail markets (Pascual-Miguel, Agudo-Peregrina, & Chaparro-Peláez, 2015). Although studies have proposed categorizations for retailers and their products (e.g. Girard & Dion, 2010; Korgaonkar, Silverblatt, & Girard, 2006; Nakayama, Sutcliffe, & Wan, 2010) to explain the behavior of markets, research on the latter has not been the main focus for several reasons. First, there is a lack of consensus about the most pertinent product categorization theory for e-retail

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(De Figueiredo, 2000). Second, due to empirical designs, theory on product categorization has not been fully tested on e-retail because most studies consider only one product category (e.g. Kumar, Bhaskaran, Mirchandani, & Shah, 2013; Smith, Fischer, & Yongjian, 2012). Third, previous studies have not tested the effects of diverse product categories on e-retail market behavior in terms of firm-level variables as the dominant research approach considers consumer behavioral theories focusing on emotional and cognitive variables of individuals (e.g. Brettel et al., 2015; King et al., 2016; Yan et al., 2016).

Extant research focuses on consumer-level variables (e.g. Gupta, Su, & Walter, 2004; Laroche, Habibi, & Richard, 2013; Wang, Wang, & Wang, 2018; Yan et al., 2016) rather than firm-level variables even when there are data available at unprecedented scale (Akter & Wamba, 2016). This approach on product categorization contributes to the literature. Therefore, the research question of this chapter is: How do product categorizations explain e-retail market behavior in terms of firm-level variables?

Existing literature concentrates on specific products or single product categories neglecting their impact on performance (Christodoulides, 2012; Smith et al., 2012). By investigating product categorization for e-retailers, this study addresses calls to study their effects on digital markets using firm-level variables such as web traffic and conversion rate (e.g. De Maeyer 2012; Nakayama et al. 2010). Only few studies consider how digital markets differ according to product categories, such as hedonic versus utilitarian or search versus experience versus credence product categories. However, the product category plays a major role to shape firm-level variables of e-retailing such as conversion rate and web traffic. The reason of the former is product awareness.

Product category awareness reflects a cognitive process of attention on tangible product categories (e.g. shoes, books). The awareness of product category is very important for e-retailers' sales performance, web traffic and conversion rate (Babić Rosario, Sotgiu, De Valck, & Bijmolt, 2016). When consumers are not aware of products, it is unthinkable that they purchase them, so, awareness is the first step of market success. In fact, product awareness increases the likelihood of consumers to buy in the future even when there was initially a negative perception (Berger, Sorensen, & Rasmussen, 2010). The reason is that product awareness is the first step in getting into the mind of e-retailers' customers. There are several ways to cause product awareness (e.g. paid advertising, physical presence, word-of-mouth). Digital media contribute with product awareness through user-generated content that serves as electronic word-of-mouth (Wen, Tan, & Chang, 2009; Zailskaite-Jakste & Kuvykaite, 2012), which ultimately affects web traffic, conversion rate and sales performances of e-retailers.

Based on literature from information economics, e-retailing and categorization of products the objective of this chapter is to present an overview e-retail market behavior. At the same time, this study theoretically argues and empirically proves how the SEC categorization of products could help to understand e-retail market behavior. The research design of this study, therefore, uses cross-sectional data analysis of a secondary database to compare diverse categories for a considerable sample size of the US e-retail firms. This chapter entails a literature review that is relevant for product categorization and insights from empirical data using two regression analyses. In doing so, the chapter provides a guideline to use regression analyses and secondary data available to study further the trends of and strategies in retail environments.

THEORY AND HYPOTHESES

Categorization of Retail Products

E-retailers are entities that sell to end-consumers through the Internet. These sales involve transactions of goods and services in small quantities (Shaw, Jones, & Mclean, 2011). According to Korgaonkar et al. (2006), e-retailers provide an ordering service for Internet users. Amazon, Sears.com, and Walmart.com are typical examples of e-retailers and there are at least four typologies of e-retailers in the literature, most of them based on their product categories.

The first criterion to categorize e-retailers depends on their commercial strategy. For example, Korgaonkar et al. (2006) categorize e-retailers in three types according to their competitive strategy. First, prestigious e-retailers leverage their offline reputation to attract customers. Second, discount e-retailers rely on low prices as the main way to sell. Third, prestigious and discount e-retailers have offline presence. In contrast, pure play e-retailers do not have offline presence and concentrate on developing specialized Internet services to attract customers.

The second criterion to categorize e-retailers depends on their goods and services. Nelson (1970) explains that goods and services differ according to how easy it is to evaluate their quality before consumption. First, search goods are the easiest to evaluate. Second, experience goods are harder to evaluate because an individual needs to experience them to assess their quality accurately. Third, credence goods are the hardest to evaluate even after consumption. Similarly, De Figueiredo (2000) proposes to distinguish goods according to how difficult it is to judge their quality. The study proposed another categorization by listing commodity products, quasi-commodity products, look and feel goods, and look and feel goods with variable quality.

The third typology categorizes goods and services according to consumers' motivations. Hedonic that provide pleasure and utilitarian that are functional (Childers, Carr, Peck, & Carson, 2001; Dhar & Wertenbroch, 2000).

The fourth typology categorizes e-retailers' offers in four according to tangibility as offline goods, offline services, electronic goods and electronic services (Francis, 2007, 2009). Table 1 shows examples of types of e-retailers and their goods and services based on studies from De Figueiredo (2000), Francis (2007, 2009), Dhar and Wertenbroch (2000) and Korgaonkar et al. (2006).

Table 1. Examples of e-retailers and typologies

E-Retailers' Strategy	Goods and Services	
Prestigious: Sears, Dillard's, Nordstrom, and Saks Fifth Avenue Discount: Walmart, Aldi, and Tesco Pure Play: Amazon, Zappos, and Overstock	Search: books, printers, computers, and toasters Experience: clothes, air flights, perfumes, and hotels Credence: vitamins, consulting services, diet pills, and water purifiers Commodity products: paper and oil Quasi-commodity products: books, videos, and CDs Look and feel goods: homes, suites Look and feel goods with variable quality: art	Hedonic goods: luxury watches and designer clothes Utilitarian goods: computer desktops, and microwaves Offline goods: groceries, flowers, clothing, and computer hardware Electronic goods: digital books, software downloads, and video files Offline services: tickets to travel, hotel accommodation, and car rental Electronic services: subscriptions and investment services

Source: self-elaborated

The search-experience-credence categorization has been found valid and relevant for e-retail as Girard and Dion (2010) and Nakayama et al. (2010) explain. It fits the context of e-retail platforms because it is based on the information available about quality of product categories (Nelson, 1970). As consumers categorize objects based on their similarity to the schema (Neisser, 1976), product categories facilitate consumers' responses (Boush & Loken, 1991). Therefore, product categorization is the key to understand diverse types of e-retailer. Therefore, categorizing product categories by their ease to evaluate quality before consumption serves to explore diverse types of e-retailer because perceived quality it entails information economics.

Perceived Product Quality

Digital environments not only drive product category awareness but it also influences consumers' evaluation about products such as perceived product quality. The reason is that information influences on the evaluation of products. Theories from information and cognitive psychology admit the convergence between external stimulus or information cues and an individual's understanding or mind cues (e.g. Vessey & Galletta, 1991). Evaluating products is a cognitive task that involves comparisons of multiple product information cues (attributes) with their expected performance and against other products (Bredahl, 2004; Steenkamp, 1990; Szybillo & Jacoby, 1974). Therefore, this study focuses on perceived product quality and how this changes with exposure to social media platforms as suggested by related studies (e.g. De Maeyer, 2012; Dellarocas, Zhang, & Awad, 2007; Hu, Pavlou, & Zhang, 2007).

Perceived product quality is a multidimensional construct that has several interpretations from the consumer and producer perspective as explained by Garvin (1984) and Stone-Romero et al. (1997). Studies explain that product quality involves judgements about subjective and objective attributes that closely mediate product value. (e.g. Garvin 1984; Ophuis and Trijp 1995; Steenkamp 1990; Szybillo and Jacoby 1974). These studies also conceptualize product attributes as information cues that serve to assess product quality. Particularly, the research of Steenkamp (1990) and Ophuis and Trijp (1995) describe models of the quality perception process and its subjectivity. In these models, consumers gather information cues and interpret them through an iterative mental process. This cognitive process resolves consumers' beliefs, expectations, and previous experience to form a single judgement about product quality. Perceived product quality summarizes the evaluation of a product, it depends on several external cues. The price and the brand of the product have been closely related with perceived product quality (e.g. Erdem et al. 1999; Jacoby et al. 1971; Szybillo and Jacoby 1974). In addition, individual's characteristics cannot be disassociated from this subjective construct. In the words of Steenkamp (1990 p. 317), *"Perceived product quality is an idiosyncratic value judgment with respect to the fitness for consumption which is based upon the conscious and/or unconscious processing of quality cues in relation to relevant quality attributes within the context of significant personal and situational variables."* This definition encompasses the subjective nature of measuring perceived product quality and factors affecting it—both internally and externally—to the individual who perceives product quality. The importance of perceived product quality to categorize retail products relies on that consumers' information needs vary according to product categories. "Consider Amazon's retail customer digital business model. Amazon's content — what is consumed — includes digital products like movies and software, as well as information about the physical products it sells or brokers" (Weill and Woerner 2013 p. 73).

Information Economics

Internet communication requires processing and ordering information. This information view is widely used across the sciences and humanities and it is also known as information philosophy (Zemanek, 1990). One of the essential theories in information science is information processing theory. It models the cognitive processes of individuals as computers. According to Gray (2010), individuals' minds comprise three elements: (1) Attention and perception mechanisms for bringing information in, (2) Working memory for actively manipulating information, and (3) Long-term memory for passively keeping information that can be retrieved in the future. Information processing requires several tasks. Heuristics about how people convey knowledge and belief is one of the major challenges in the field. For instance, early literature looked into the complex processes within people's mind while processing information and forming an inferential belief (e.g. Dover 1982). Another study from Phillips and Sternthal (1977) looked at differences between people regarding information processing. In their research, age differences result in a complex set of changes in people's susceptibility to social influence, ability to learn, and the use of sources of information. Their findings have direct implications for the theory and practice of marketing and advertising as information processing differences affect the effectiveness of communications. Therefore, viral marketing and advertising communications are studied under the lens of information processing.

Consider two recent studies. The first study from Eckler and Bolls (2011) uses information processing theory to explore the effect of emotions in viral video advertisements over the Internet. The study shows that emotional tones of pleasant and coactive nature elicit attitudes towards the advertisement and brand. Additionally, these emotional tones increase the likelihood to share the video advertisement. The results from the research by Eckler and Bolls (2011) contrast the popular belief that scaring and shocking online users motivate them to share content. The reason is that emotional tones of unpleasant nature result in the lowest likelihood to share the video advertisement in their study. Following information processing theory, the authors look to show the sequential nature of online viral video advertisements in three steps: (1) Individual's attitude towards the advertisement, (2) Individual's attitude towards the brand, and (3) Individual's intention to share the advertisement. Similarly, the second study from San José-Cabezudo and Camarero-Izquierdo (2012) uses the processing information theory to look into variables affecting viral messages over the Internet. However, this study merges a social capital approach with information processing theory in the context of business communication. It found that viral marketing through e-mail, also considered as a form of electronic word-of-mouth, depends on individuals' social capital. Someone who believes that opening and forwarding persuasive e-mails would increase his or her social capital will be prone to share e-mail viral messages. The results of this study have direct implications for the theory and practice of marketing and advertising as well. The reason is these results show that social capital and information processing affect the reach of viral marketing and advertising communications over the Internet. Social capital affects the viral dynamics. In that line, individuals' integration and relationship with the network and their attitudes towards viral messages are critical to the information processing of receiving and forwarding e-mails (Camarero-Izquierdo & San José-Cabezudo, 2011). Information processing is a cornerstone of Internet communication and it requires ordering and organizing information.

Contingency theory considers the lack of a perfect way to organize information and its uncertainty as the major challenges to overcome in communication. The best way to organize depends on the environment to which an organization relates (Scott & Gerald, 2007). According to the interpretation of

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some studies (e.g. Jermier & Forbes, 2011), contingency theory can be summarized by considering the following three assumptions. First, organizations are open systems balancing internal needs. At the same time, organizations adapt to environmental circumstances. Second, there is not a general best way for organizing. It is only determined through in a case by case basis involving the environment in which an organization competes and the type of activities an organization carries out. Third, top managers aim to achieve good fits between the structure of their organization and the different environments in which their organization operates. As different types of organizations are needed according to different types of environments, the concept of congruence lies at the heart of contingency ideas as Tushman and Nadler (1978) explain. In their study, the authors also propose and integrated view by merging contingency and information processing approaches as these two approaches are used in organizational design and organizational structure. Similarly, contingency and information processing theories are often considered the two pillars of information richness theory which is essential to understand media studies and Internet communication.

Information economics obey to the number of their consumers and how they acquire knowledge and transfer it to other consumers (Nelson, 1970, 1974). An e-retailer marked with a product category that is easy to evaluate before consumption have more consumers than an e-retailer marked with a product category that is hard to evaluate before consumption. E-retailers with these product categories have high web traffic. This is because as number of consumers of a product's category increases, knowledge acquisition and transfer about the quality of that product category increases. The latter relies on the validation of information through the representativeness of sampling and triangulation which helps to produce objective information, also called social proof in e-retail studies (Amblee & Bui, 2011; Tu & Lu, 2006). Therefore, a product category that is easy to evaluate before consumption would attract greater web traffic than a product category that is hard to evaluate before consumption, which leads to the first hypothesis about e-retail market behavior in terms of firm-level variables as follows:

H1: The ease to evaluate quality before consumption of an e-retailer defined by a product category increases the web traffic of that e-retailer.

Web traffic and conversion rates are key elements of e-retail market behavior as both drive demand for e-retail companies, in this context, the medium is the market (Ayanso & Yoogalingam, 2009; Hoffman & Novak, 1997). Since supply meets demand (Arakji & Lang, 2010; Enders, Hungenberg, Denker, & Mauch, 2008; Oestreicher-Singer & Sundararajan, 2012), there would be more e-retailers offering product categories easily evaluated than e-retailers offering products that are hard to evaluate. This produces an environment prone to fierce price competition (Shin, 2001; Xiao & Benbasat, 2007). E-retail companies defined by those product categories would have low conversion rates because their competitive environment incentives opportunism, convenience and disloyalty (King et al., 2016; Lal & Sarvary, 1999; Porter, 2001). The former is evident in commodity markets because commodities are easy to evaluate and compare, this creates an environment in which companies mainly compete with prices. Switching to another e-retail has a low cost for consumers of product categories that are easily evaluated before consumption because there are many options. In contrast, e-retail companies defined by products which are hard to evaluate before consumption have high conversion rates because information about their quality is scarce and switching cost is high as there are few options. Thus, the second hypothesis describing the e-retail market behavior based on e-retailer's product category in terms of firm-level variables is:

H2: The ease to evaluate quality before consumption of an e-retailer defined by a product category decreases the conversion rate of that e-retailer.

Provide broad definitions and discussions of the topic and incorporate views of others (literature review) into the discussion to support, refute, or demonstrate your position on the topic.

METHODOLOGY

Selecting Product Categories

To select e-retailers, this study uses existing research on search, experience and credence products (e.g. Ekelund, Mixon, & Ressler, 1995; Girard & Dion, 2010; Korgaonkar et al., 2006; Nakayama et al., 2010). First, for e-retailers with search goods, this chapter considers an e-retailer of computers, electronics, and appliances such as PCs, MP3 players, CDs, microwaves, printers, and cartridges. Second, for e-retailers with experience goods, this study considers an e-retailer specialized in apparel and accessories such as clothes, shoes, fragrances, and sunglasses. Third, for e-retailers with credence goods, this study considers an e-retailer specialized in nutritional supplements such as vitamins, herbal supplements, and diet pills.

To validate the former product categories this chapter ran an online experiment that submits each product category to participants in Amazon Mechanical Turk (MTurk). Following a random arrangement participants explain participants about each product category; participants were asked to evaluate the ease to evaluate each category before consumption. Two t-tests were used to confirm that significant differences between product categories showing that computer-electronics were easier to evaluate than apparel-accessories (t (235) = 2.1, p = .03). In addition, the category of apparel-accessories were significantly easier to evaluate than health/beauty (t (238) = 5.1, p < .01).

Empirical Context and Measures

To test the first hypotheses about the ease to evaluate quality of a product category on market behavior in terms of firm-level variables, cross-sectional data pertaining to the US e-retail industry for the year 2011 were used. The sample consisted of the biggest US e-retailers, ranked by online sales. These data were obtained by Vertical Web Media and published by the Internet Retailer Top 500 Guide (2012). This organization has collected data from e-retailers in US since 2003 which have also been used in empirical research about e-retail (see Ayanso & Yoogalingam, 2009; Oberoi, Patel, & Haon, 2016). In Table 2, an overview of conceptual and operational measures is presented. E-retailer's product category is the independent variable and follows the SEC categorization of products with three levels of ease to evaluate quality before consumption. The two dependent variables that depict e-retail market behavior are web traffic and conversion rates. Control variables such as merchant type, mobile commerce capability, website consistency and personalization were included following previous research (e.g. Li, Dong, & Chen, 2012).

Sample and Regression Analyses

A sample of 216 e-retailers was used to run two regression analyses that served to test H1 and H2 each one with five main effects (1 factor and 4 controls). The main factor was level of ease to evaluate quality before consumption of the product category and the controls were merchant type, mobile commerce capability, website consistency and personalization. For each regression analysis, a Levene's normality test was significant; showing the dependent variable in each regression (web traffic and conversion rate) was positively skewed. To avoid the risk of obtaining false conclusions due to biased F tests, both hypotheses tests follow the recommendation to increase the confidence level of the test to 97.5% (Meyers, Gamst, & Guarino, 2013; Patel & Haon, 2014). A multicollinearity diagnostic for covariates showed that the maximum value of the Variance Inflation Factor across covariates was 2.4, which suggests low multicollinearity (G. Tabachnick & S. Fidell, 2007; Meyers et al., 2013).

Discussion of Results

Table 3 show results for both regression analyses. In Model 1 for web traffic, results show that H1 was partially supported ($\beta = 85M$, $r(208) = .19$, $p = .08$) the ease to evaluate a product category before consumption has a positive effect on web traffic although it showed a small effect size. In Model 2 for conversion rate, results show that H2 was supported ($\beta = -.016$, $r(208) = .36$, $p < .01$) because the ease to evaluate a product category has a negative on the conversion rate as expected.

Results for H1 may look weak under rigorous analysis. There are many individual characteristics of each firm that have greater effects on market performance such as such as firm's age and size, socio-demographical target segment, etc. has previously outlined (e.g. Bakos & Brynjolfsson, 1999; Chen, Su, & Hiele, 2017; Homburg, Jozić, & Kuehnl, 2017; Lilien & Yoon, 1990). However, the results obtained in this study suggest a trend on the direction of H1 despite acknowledging other firm's variables. This marks a clear line of study to foster the understanding of product categorization on e-retail markets and control the spurious effect of other firm's variables to validate this result.

Table 2. Summary of measures

Conceptual Variables	Operational Measure
Web traffic	Annual website visitors
Conversion rate	Number of website visitors who have completed a transaction divided by the total number of website visitors
E-retailer's product category	Level of ease to evaluate quality before consumption of the product category: (3) computer-electronics, (2) apparel/accessories, and (1) health/beauty
Merchant type	Dummy variables (0,1) indicating merchant type: web only, retail chain, or consumer brand manufacturer
Mobile commerce capability	Absence or presence of mobile commerce capability that allows consumers to make online purchases (0, 1)
Website consistency	Relative quality ranking indicating the response time for completing transactions: (1) Poor, (2) Fair, (3) Good, and (4) Excellent
Website personalization	Absence or presence of website personalization feature that allows consumers to decide website content (0, 1)

Source: self-elaborated

Table 3. Regression analyses

	Model 1 for Web Traffic	Model 2 for Conversion Rate
	Unstandardized Coefficients	
	β	β
Constant	.-203,206,992 (155,593,642)	0.0895 (0.007)
Controls		
Merchant type: Web only	.-10,475,055 (95,503,197)	.-0.0177*** (0.004)
Merchant type: Retail chain	20,398,481 (92,472,769)	.-0.0297*** (0.004)
Merchant type: Consumer brand manufacturer	120,294,333 (99,064,444)	.-0.0287*** (0.004)
Website consistency	29,087,502 (23,238,394)	.-0.001*** (0.001)
Website personalization	}-32131496 (57,712,032)	.-0.0031 (0.002)
Mobile commerce capability	15,176,372 (62,667,114)	0.0044 (0.003)
Independent variable		
E-retailer's product category	85,059,986* (48,640,424)	.-0.0155*** (0.002)
Key statistics		
N	216	216
F	1.32	16.92
R^2	0.043	0.362
Adjusted R^2	0.010	0.341
	Notes: $p < 0.1$*; $p < 0.05$**; $p < 0.01$***. Standard errors are indicated in parentheses. The dependent variable for model 1 is web traffic and for model 2 is conversion rate	

Source: self-elaborated

On the other hand, H2 results are straightforward. Not only these are consistent with information economic theory but also fitness of the regression is decent as there are many variables out of the analysis. This suggests that adding more firm's control variables or crossing a study with consumer analyses for each firm, it is possible to reach a predictive level ($R^2 > .5$) in further experiments.

CONCLUSION

This study empirically tests hypotheses about product categorization and market behavior using secondary data. Although previous research have proposed that a product categorization follows the firm's strategy (Winzar, 1992), this chapter theoretically argues that the SEC categorization of products still explains e-retail market behavior in terms of firm-level variables. This study proves the former and extends the study of Pascual-Miguel et al. (2015) about the effect of product category on purchase intent.

The SEC categorization can explain e-retail market behavior because the ease to evaluate quality of an e-retailer's product category before consumption depicts information economics about product quality. This triggers the process with which consumers evaluate quality. It involves understanding consumer's knowledge acquisition and belief formation as explained in the theory and hypotheses section. The for-

mer may be the key to understand why even when offline retailers have been closing their stores at an unprecedented rate as new product categories enter in the online market (Peterson, 2017). The ease to evaluate an e-retailer's product category quality before consumption decreases the conversion rates of that e-retailer; conversely, this increases the web traffic of that e-retailer. The SEC product categorization, therefore, is still valid for digital environments (Nakayama et al., 2010). As it is based on understanding information economics about the quality of products, it helps to explain e-retail market behavior.

The present chapter validates the three levels of the SEC categorization of products and how this explains e-retail market behavior in terms of sales performance. This is an important contribution as studies only compare dichotomous categorizations of products and do not integrate them with the process with which consumers search information, gather knowledge and form beliefs to evaluate product quality (e.g. Dhar & Wertenbroch, 2000; Francis, 2009; Okada, 2005). Although product categorization may be confusing because products contain search, experience and credence attributes simultaneously (Viswanathan & Childers, 1999), there is a dominant attribute to categorize a product. The former logic serves to also understand the proposition of this chapter to generalize this categorization to the firm-level as the study categorizes e-retailers based on a main product category. This is crucial to explore the mechanism with which a product categorization explains the e-retail market behavior using firm-level variables in the way presented in this study. These variables web traffic and conversion rate outline that the medium is also the market for e-retail outlets (Ayanso & Yoogalingam, 2009; Hoffman & Novak, 1997) and that the SEC categorization of products helps to explain it.

This chapter extends research of Habibi et al. (2014), Laroche et al. (2013), and Smith et al. (2012) by analyzing the impact of diverse product categories and types of e-retailers. This chapter proposes to represent experience goods with tangible e-retail products rather than to represent them with services, which is usually present in the literature. For instance, to represent experience goods this study uses apparel and accessories whereas previous studies have used hair salons, hotels, fitness studios, welding services, or carpet cleaning (e.g. Ekelund et al., 1995). This specification also helps the present study to contribute not only in the theory but in the practice. The reason is that this chapter can also be relevant for practitioners as it is directly linked to the retail sector.

The study provides a guideline to explore and analyze online shopping behavior at firm-level, by showing the different effects of product category on sales performance. Its major methodological implication arises from showing another way of studying e-retail products by using broad categories of products rather than narrow specific products (e.g. Oestreicher-Singer & Sundararajan, 2012). This is faster and can deliver results in cases where data from companies is limited and when product categories are sufficient to drive conclusions. This methodological implication is essential to design and replicate online experiments and produce knowledge with less resource than studying specific products for organizations researching product categories. Some advantages of the methodology include the following: (1) less time for data analysis, (2) fewer treatment groups, (3) less time for data collection, and (4) less computer processing power. Additionally, exploring measures to categorize e-retailers by their main product categories provides a starting point to build instruments for business modeling and analysis as suggested by previous studies (e.g. Akter & Wamba, 2016; Baden-Fuller & Mangematin, 2013). This is particularly important for e-businesses where empirical data is readily available. Although categorizations are merely theoretical, exploring and analyzing how consumers sense them provide a glimpse into how categorizations gather and shape knowledge about online shopping behavior as this methodology shows with empirical data on e-retailers' sales performance.

For those managers of e-retailers, the study provides a road map that helps them to select and focus on product categories. This improves the practice of category management often used in retail. First, it is possible to make better predictions about product choice in buying decisions by analyzing the network of consumers according to their main product categories and digital platforms they use (Bowler, Dahlstrom, Seevers, & Skinner, 2011). This study swiftly shows so by analyzing consumers' relationships with diverse e-retailers. The implications of these analyses can be integrated into predictive models concerning supply and demand of e-retail products. Second, it is possible to segment markets in new ways by understanding the variability how consumers perceive the quality of products and how easy is for them to evaluate it. This could be useful when traditional segmentation fails and the market is compounded by very hetero-geneous groups (Brandt, Pahud de Mortanges, Bluemelhuber, & van Riel, 2011). This chapter shows a way to segment consumers relying on their perceptions about product categories; therefore, it serves to segment e-retail consumers. It also provides guidelines to order e-retail content within their web shops and improve promotional efforts and site usability for their consumers seeking products. Consequently, this chapter provides advantages to managers of e-retailers targeting many diverse customers with diverse product categories simultaneously. Third, it is possible to allocate resources better among retail web sites by understanding product category and platform differences (Smith et al., 2012).

FUTURE RESEARCH DIRECTIONS

This study has several conceptual and empirical limitations. First, it studies the performance of e-retailers only in terms of web sales, conversion rate, and web traffic and ignores other important and relevant performance measures, such as profits. Second, the empirical context is limited to top e-retailers in the US. However, it would be worth of studies if these results can be generalized to other Internet-based channels like m-commerce, social media sites, and the mobile applications market.

To advance these findings, we call for research on product categorization that includes consumers' patters for searching information about product quality and their buying behavior. The implications of product categorization might differ if the former factors interact as suggested by previous studies (e.g. Hsu, Li, Li, & Liu, 2016; Lee & Phang, 2015; Zhou, Zhang, & Zimmermann, 2013). These points should be addressed in future research.

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Chapter 9
Assessing the Power of Social Media Influencers:
A Comparison Between Tourism and Cultural Bloggers

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ABSTRACT

Despite the rapidly increasing popularity of social media influencers and of influencer marketing, academic and managerial knowledge on this phenomenon is still limited. The purpose of this chapter is to examine to what extent cultural and tourism social media influencers are able to influence their followers' consumption decisions. In particular, the chapter provides new evidence based on data collected among 341 followers of hospitality and tourism bloggers and 208 followers of cultural bloggers in Italy. By comparing the results from the two subsamples, conclusions about the effectiveness of bloggers in the two contexts are drawn. Based on the findings, some avenues for future research and some practical guidelines for social media influencers are suggested.

INTRODUCTION

Over the last decade, new advances in technology, and particularly the advent of social media, have changed people's daily lives, creating new phenomena such as the boom in digital influencers and influencer marketing that will be addressed in this chapter. Technological changes have familiarised people with searching for online information when they make purchase decisions of any type, from buying a new smartphone to visiting a museum. Hence, consumers have changed their role from passive subjects who are exclusive receivers of information to active subjects who give advice and information to others, making user-generated contents (UGC) a key source of information in many contexts. The expression

'user-generated' indicates the role of internet participants who actively communicate and share their opinions online (Van Dijck, 2009). Even if UGC pre-existed the advent of internet and social media, it was through these developments that UGC has become easily generated and widely accessible (Daugherty, Eastin & Bright, 2008; Smith, Fischer & Yongjian, 2012). As a result of this process, in the new connected world, the new media are guided more by UGC than by branded contents.

However, the idea of social media is not so recent. In fact, the ancestor of social media was Usenet, a world network created in 1979 by two American scientists, Tom Truscott and Jim Ellis, from Duke University. The network was able to connect servers all around the world and it allowed the exchange of information and messages. The social media era started with 'Open Diary', an online diary community of writers founded in 1998 by Bruce and Susan Abelson. Open Diary lasted almost 20 years. In fact, it went offline in 2014, and has been relaunched in 2018. It was during these years that the term 'weblog' was transformed into 'blog' by a writer who first used the expression 'we blog', and from then on, the term blog has become popular.

The growth of social media became exponential thanks to the advent of the second stage of the internet: the so-called Web 2.0. This new internet stage was called the participative, or social, web because it was characterised by the transition from the static webpages of Web 1.0 to dynamic UGC and also by the interoperability between systems and devices. In particular, the term 'user-generated content' defines online contents created and diffused directly by users, who are not necessarily expert professionals. In summary, Web 2.0 has multiplied the volume and exchanges of UGC. Drawing on these premises, Kaplan and Haenlein (2010, p. 61) defined social media as '*a group of Internet-based applications that build on the ideological and technological foundations of Web 2.0, and that allow the creation and exchange*.'

Kaplan and Haenlein (2010) provided the first effective classification of social media, which remains valid today, and makes a distinction between:

1. **Collaborative Projects:** Social media that allow people to simultaneously work and create contents and knowledge, and thus the most democratic type of social media. Kaplan and Haenlein (2010) identified four types of collaborative projects:
   a. Wikis, in which everyone can participate and add, change or delete content by simply using a web browser. The most famous example is Wikipedia, the free online encyclopedia born in 2001 and created by volunteers from all over the world;
   b. Social bookmarking, or sites providing centralised online services that allow users to collect, manage and share online resources. By using tags to the contents of a website users can save links and create bookmarks. Contents can be classified by importance using different font sizes and colours. In this way people are able to build their own taxonomy system (called folksonomy). For example, Citeulike is a free service for managing and sharing scientific references between researchers;
   c. Internet forums or message boards, which are sites for discussion where people can post their opinions in the form of messages. In some forums, the publication of the posts is subject to the approval of a moderator;
2. **Review Sites**: These are where users can exchange opinions about goods, services and firms. One of the first review sites was TripAdvisor, which has become highly popular, where users can post reviews about hotels, restaurants and places of interest.
3. **Blogs:** These represent the first type of social media that was established (see the case mentioned above, Open Diary). In general, blogs are websites that periodically updated that can be written by

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an individual or a small group of people. In general, blogs can assume different forms: personal blogs are 'diary-style websites' (Johnson & Kaye, 2004, p. 622) on which bloggers express their opinions, reviews, ideas, personal stories and emotions about a specific topic (e.g., fashion, tourism, culture, sports) (Magno, 2017), while business blogs are related to a firm or a business. In contrast to personal blogs, the contents of business blogs are less personal and have the goal to create traffic, visibility and popularity for the business. A modern form of blog is the reverse or guest blog. In this case the blog is managed by a single blogger, but anyone can act as a host writer.

4. **Content Communities:** These are online communities that allow people to share their multimedia materials. Examples of these social media are Slideshare (for Powerpoint presentations) and Youtube (for videos).
5. **Social Networking Sites (SNS):** These are online platforms that enable users to connect and interact with others by creating an individual profile. Through her/his profile an individual can post photos, information, videos, links and send instant messages. There are different types of SNS for different goals. For example, LinkedIn is used to create professional connections, while the most famous SNS, Facebook, is used for entertainment.
6. **Virtual Worlds:** These are online community spaces in which users can interact and build simulated worlds by means of three-dimensional graphical models named avatars. There are two types of virtual worlds:
   a. Social worlds are interaction-based communities. In this case, through avatars users can simulate virtual worlds in all fields (educational, commercial, political and so on);
   b. Game worlds are entertainment-based communities, born in the 1990s thanks to the launch of interactive virtual worlds. Nowadays, the most important brands of video game consoles (such as Microsoft's X-Box, Sony's PlayStation and Nintendo Switch) use these online platforms, which allow the user to play simultaneously with players around the world.

In conclusion, it should be noticed that while the active role of users is a key point of the social media era, a distinction can be made based on the type of online participation: on the one hand, 'lurkers' use and read online contents (consumption) but do not actively participate in creating content, while 'posters' actively participate and generate online contents (contribution). What is fundamental in fostering this active participation is the feeling of being part of a community (Heinonen, 2011). In particular, some users are emerging as online/social media opinion leaders defined as social media influencers or digital influencers, who are able to influence the decisions of others, called followers or general users. While the popularity of this phenomenon is growing, academic research in this area is lacking. The next paragraphs will summarise the available knowledge on this topic.

THE EMERGENCE OF SOCIAL MEDIA INFLUENCERS

Social media or digital influencers, commonly labelled as influencers (and sometimes indicated also as online opinion leaders), are defined as '*a new type of independent third-party endorser who shapes audience attitudes through blogs, tweets, and the use of other social media*' (Freberg, Graham, McGaughey & Freberg, 2011, p. 90). The elements that characterise social media influencers are the number of their followers and posts, and in addition, their independence from firms. In general, influencers become leading online figures because they are perceived as experts in a specific field, and as a consequence, as

reliable sources of information. Online influencers create their reputation through their active participation in online communities, through which they develop their role as social connectors. According to Lyons and Henderson (2005), it is possible to identify some traits of social media influencers based on the well-established notion of opinion leadership in interpersonal communication (Rogers, 1995). In particular, these people are characterised by creativity and openness to online innovations and novelty (Kvasova, 2015); digital exhibitionism, in the sense that they have a tendency to show their expertise to obtain admiration and recognition by others; competence in interpersonal relationships, related to their ability to interact and spread information to others. As a consequence, and differently from traditional sources of information, social media influencers are considered credible, trustworthy and sincere (Song, Cho & Kim, 2017). In short, social media influencers spread online information and recommendations through online channels, and in this way they are able to influence the judgements and opinions of their followers, and ultimately their decisions.

There are several types of online influencers. In particular, based on their number of followers a distinction can be made between macro-influencers and micro-influencers. Macro-influencers have tens of thousands or millions of followers, which is in general a consequence of their status as famous people (celebrity influencers). In recent years, both practitioners and researchers have reported that the perceptions of this type of influencers are changing. In fact, their enormous numbers of followers makes it obvious that direct management of the community and one-to-one interactions is not possible. Due to these reasons, macro-influencers are perceived as driven by commercial purposes, and therefore less trustworthy. Conversely, micro-influencers have a number of followers that does not usually exceed 10,000. These influencers are specialised in niche topics, and compared to macro-influencers, they feed their social media more actively. As a consequence, they are perceived as ultra-engaged. Micro-influencers respond to almost all the comments and questions of their followers, thus building stronger engagement, trust and influence capacity. Micro-influencers are becoming real celebrities, or more precisely microcelebrities who, as indicated by Senft (2008, p. 25), are characterised by '*a new style of online performance that involves people "amping up" their popularity over the Web using technologies like video, blogs and social networking sites.*'

Several other classifications of types of influencers have been developed by practitioners and scholars. Among these, Iliff (2016) identifies seven groups of influencers: celebrities, journalists, analysts, thought leaders, brand journalists, bloggers and platform-specific 'sensations' (this last group includes influencers that have fully understood the power of 'edutainment' and are known for something very specific, such as how-to tutorials).

In this chapter we will focus on a specific type of influencers; i.e., bloggers, or people who possess their own online space, the blog, and have complete control of the content posted. This feature means that they are able to establish strong links with their followers. As we will see in the next paragraph, bloggers share with macro-influencers the ability to be trendsetters. However, they also share with micro-influencers the capability to interact very closely with their readers. Finally, it should be noted that not all bloggers are able to become influencers. In this chapter we will focus on the role of bloggers as influencers. In particular, in the next paragraph we will review the factors that make a blogger able to influence her/his followers' attitudes and behaviours. Through this analysis we will highlight the knowledge gap that will be addressed by the following empirical analysis.

THE IMPACTS OF INFLUENCERS AND INFLUENCER MARKETING

As highlighted earlier, currently the importance of micro-influencers is increasing with respect to that of macro-influencers in the online context. In fact, macro-influencers are perceived as too distant and as the endorsers of different brands. Therefore, their messages are not viewed as sincere, but rather, as manipulated and controlled by their sponsoring firms and organisations. In short, they are unable to create real engagement (Uzunoğlu & Kip, 2014). Academics and practitioners are increasingly interested in the concept of engagement due to the capacity of this factor to affect attitudes and behaviours. Engagement is an umbrella concept that consists of different aspects, such as interactivity, involvement, participation, connection and co-creation (Brodie, Ilic, Juric & Hollebeek, 2013; Hollebeek, Glynn & Brodie, 2014). Different studies have stressed the importance of blogs in creating engagement. Indeed, engaged readers view themselves as valuable members of a community, and as a consequence of this they are inclined to follow the advice of the blogger, and the blog plays an active role in the decision-making process of its readers.

What are the elements that determine the effectiveness of a blog? Blogs are perceived as more reliable and credible compared to both traditional and other online sources (Magno, 2017). Studies on word-of-mouth (WOM) and eword-of-mouth (eWOM) (Kim, Kandampully & Bilgihan, 2018; King, Racherla & Bush, 2014) have consistently shown that source credibility is a strong antecedent of attitudes towards eWOM information and of eWOM effectiveness. Consumers perceive that eWOM information is reliable and unbiased because the source has no commercial purpose (Matute, Polo-Redondo & Utrillas, 2016). However, consumers are becoming more suspicious of eWOM, particularly due to the spread of review manipulations strategies, such as businesses writing negative reviews about competitors, writing self-reviews, engaging commercial raters to write reviews, and many others (Gössling et al., 2018).

The eWOM theory has been extended to the case of bloggers and other social media influencers. On this point, Cosenza, Solomon, and Kwon (2015) underline that the quality and reliability of contents plays an important role because the interactive nature of the blog and the possibility of exchanging opinions in a transparent way allows readers to enrich the contents of the blog on one hand, and on the other hand to appreciate and rely on the reliability and competence of the blogger (Brodie et al., 2013). Content quality is able to reduce readers' uncertainty, and consequently it creates attachment to the blog (Tsai & Men, 2013).

In addition, perceived enjoyment is considered another important element of satisfaction with blogs (Shiau & Luo, 2013) and a driver of engagement (Turel & Serenko, 2012). Enjoyment is a consequence of the experience derived from reading a blog. It is important that readers enjoy spending time on a blog because this will create psychological engagement. As a matter of fact, through this emotional component a blog becomes a part of the life of the reader, increasing her/his sense of belonging to the community. Therefore, the higher the perceived enjoyment, the stronger the intention to comply with the suggestions contained in the blog (Hsu, Chuan-Chuan Lin & Chiang, 2013).

Finally, another important element in determining the effectiveness of a blog compared to other sources of information is homophily, or the similarity in the characteristics, values, needs and points of views among the members of the community. In fact, people tend to socialise with others that are perceived as similar. In particular, blogs offer readers the opportunity to interact with people who have common interests (Keng & Ting, 2009). These interactions create a relationship similar to that with a friend. In short, a blogger is perceived as an expert and at the same time a 'person like me'. From this perspective, the blogger frequently enriches their posts with personal elements and information or stories

from daily life, and these aspects increase followers' sense of belonging to a community (Bagozzi & Dholakia, 2002). This leads to the establishment of a community that is more cohesive than the communities created around macro-influencers. For these reasons, 'regular' bloggers have a higher capacity for penetration and effectiveness than celebrity bloggers.

Due to influencers' capability to create engagement, firms are increasingly resorting to influencer marketing; i.e., a form of marketing that involves activities aimed at identifying and building relationships with influencers—bloggers in our case—by virtue of their capacity to influence their followers (Sammis, Lincoln & Pomponi, 2015). Investment in traditional marketing strategies is becoming too expensive, and their effectiveness is decreasing compared to a decade ago. In fact, customers are becoming more expert, selective and resistant to traditional marketing strategies. Through influencer marketing, firms try to increase the return on their marketing investments. The target of a blog is small, but more focused, and as a consequence, the firm is more likely to reach its own target. In short, the blogger is used as a credible and authentic endorser of the brand. In addition, relying on bloggers is less expensive, so that even with a limited budget, a firm can opt for a blogger campaign that allows it to use a number of different bloggers, thus reaching the different specific targets of each blog. In short, influencer marketing is emerging as a cost-effective marketing instrument (Brown & Hayes, 2008). In some fields, such as the fashion industry, influencers are considered the key actors in the diffusion of new trends.

The boom of influencer marketing is clearly highlighted by the data published by Klear—a big data influencer marketing software platform—their 2017 annual report, 'The State of Influencer Marketing'. In particular, the firm published data obtained from the analysis of 1.5 million Instagram #ad posts. In 2017, influencer marketing grew by 198%. In particular, 1.5 million posts with a #ad hashtag were published on Instagram during 2017; twice the number of posts in 2016. In this context, micro-influencers enjoyed considerable attention in 2017. In addition, in 2017 many companies made their first approach to using this type of marketing strategy. The results were notable, with almost 90% of the sponsored posts receiving up to 1,000 likes each, signalling the level of influence involved in #ad posts. The average #ad post received 682 likes. Obviously, influencer marketing not yet popular in all industries. Klear also identified the top ten industries that partnered with influencers in 2017:

- Fashion and accessories;
- Beauty and cosmetics;
- Food and beverages;
- Automotive;
- Consumer electronics;
- Travel;
- Entertainment;
- Retail;
- Tech;
- Fitness and wellness.

As can be seen above, fashion and beauty are the driving industries. An example is provided by the role of influencer marketing in the development of the brand 'Daniel Wellington' (DW). DW is a Swedish company founded by Filip Tysander in 2011, selling basic quartz watches with a classic and minimalist style. The company adopted an inexpensive marketing influencer campaign through Instagram influencers. DW sent them a watch as a present, and in return, it required followers to post a photo with the

watch on their profile. In 2015, only four years after its foundation, DW has sold one million watches worldwide for a profit of $220 million. One year later, the company made $230 million in revenue and $111.5 million in profits. In 2017, DW was named the fastest growing company in Europe, with more than 6,000 shops in 75 countries, from the Faroe Islands to Japan (https://nordic.businessinsider.com/swedish-companies-dominate-incs-5000-fastest-growing-private-companies-in-europe---take-half-of-top-10-2017-2), and their marketing strategy has remained unchanged up to now.

As stated by Klear, retailing is also among the top ten industries that partnered with influencers in 2017. For example, analysis of a Canadian food retail chain revealed that content created with influencers, particularly video content, is often very popular and a key driver of consumer engagement and of the retailer's visibility through sharing and tags (Ladhari, Rioux, Souiden & Chiadmi, 2018). Influencers also play a fundamental role in the case of multichannel and omnichannel retailing; for example to provide advice (Rejón-Guardia & Luna-Nevarez, 2017). In addition, research by eMarketer showed that, while being relatively slow adopters of influencer marketing, retailers are major users of this marketing strategy, with the aim of driving traffic to stores and sites (eMarketer, 2015).

However, despite the growing popularity of influencer marketing, evidence on the effectiveness of influencers in shaping their followers' attitudes and behaviours is scarce. To increase our understanding of this issue, we propose and test a model linking a blog's perceived enjoyment and content quality to the intention to comply with the suggestions of the blog. The model draws on previous research highlighting the distinct roles of utilitarian and hedonic components as antecedents of consumer behavioural intentions (Cassia & Magno, 2012; Homer, 2008; Magno, Cassia & Ugolini, 2017; Voss, Spangenberg & Grohmann, 2003). We suggest that blogs, as is the case for every consumption object, are placed by followers on both a utilitarian dimension of instrumentality (i.e., how useful or beneficial the object is), and on a hedonic dimension measuring the experiential affect associated with the object (i.e., how pleasant and agreeable those associated feelings are) (Batra & Ahtola, 1991, p. 161). Content quality reflects the utilitarian dimension, or the perceived usefulness (in terms of accuracy, reliability, etc.) of the information shared by the blogger in guiding consumption decisions. On the contrary, enjoyment refers to the hedonic aspects of fun and pleasure experienced by the followers when spending time on the blog. These feelings are valuable in establishing an emotional and trust-based attachment to the blog, making followers more willing to comply with the blog's suggestions (Hwang & Zhang, 2018; Thomson, 2006).

Therefore, we propose the following hypothesis:

H1: Both perceived enjoyment and perceived content quality are significantly and positively related to the intention to comply with the suggestions provided by the blog.

EMPIRICAL STUDY

Research Setting and Methods

To explore the effects of influencers on their followers' decisions we conducted research in two industries: the tourism and hospitality and cultural industries. The decision to test our hypothesis in two different industries was motivated by the intention to obtain more generalisable results. In particular, while tourism and hospitality is undoubtedly one of the industries with the highest number of influencers (Bokunewicz & Shulman, 2017; Magno & Cassia, 2018), this phenomenon is also taking root in the

cultural sector (Magno, 2017). The two industries differ in the type and size of their markets: in tourism and hospitality the mass segment constitutes the largest part of the market, while cultural industries are to large extent the sum of numerous niche markets. Therefore, observing influencers' effectiveness in these two different industries gives the opportunity to better appreciate the relevance of the phenomenon and gain more generalisable knowledge.

Italy was selected as the research context because the phenomenon under investigation is highly developed in this country. Proof of this statement is provided by the enormous number of followers of the top 100 influencers in Italy (http://www.audisocial.it/classifica). In addition, according to Klear's (2018) report, Italy ranks third after the USA and the UK when considering the number of sponsored posts posted during 2017. Given the boom in influencer marketing in Italy, Italian authorities have also recently intervened to remind influencers that according to Italian consumer protection law (Codice del Consumo) they are obliged to include hashtags such as #ad, #advertising, etc. in their sponsored posts (AGCM, 2017).

To assess the impact of influencers, we directly surveyed their followers. In particular, to recruit participants we followed these procedures: for the tourism and hospitality industry, we contacted members of the Italian Association of Travel Bloggers (http://travelbloggeritalia.it), which includes the most influential tourism and hospitality bloggers in Italy and asked for their support in distributing our questionnaire. Three bloggers agreed to participate and published posts on their social media pages with a link to our questionnaire. Overall, we obtained 341 usable questionnaires. For the cultural industries, we contacted the top Italian cultural bloggers listed in Teads's (https://teads.tv) list, and two agreed to post a link to our questionnaire. Through this procedure we received 208 usable questionnaires. Table 1 describes the profiles of the participants. For both samples, most of respondents were aged between 26 and 55 and had a middle-to-high level of education. In addition, a large majority of participants visited travel or cultural blogs at least once a week and many of them at least once a day.

After an introduction to the purpose of the research, the questionnaire was structured into two sections. The first included questions about the profiles of the respondents. The second included questions to assess the respondents' intention to comply with the suggestions of the blog (e.g., to travel to the destinations indicated by the blog or to attend an art exhibition recommended by the blog) and respondents' perceptions of two antecedents of the intention to comply (Magno, 2017): enjoyment of the blog and blog's content quality. Each of the three constructs was measured in multiple items, drawing on available measures (Hsu & Lin, 2008; Li, Zhou, Kashyap & Yang, 2008; Magno, 2017). In detail, participants were presented with four statements about the blog's content quality, three statements about their enjoyment of the blog, and two statements about their intention to comply with the suggestions made in the blog. For each statement, respondents were asked to indicate their level of agreement using Likert-type 7-point scales (with extremes being 1=completely disagree and 7=completely agree). As we used well-established measures from previous studies we assumed that they were valid and reliable and therefore no pilot study was conducted. This assumption was confirmed through a confirmatory factor analysis which supported the convergent and discriminant validity of the measures. Data analysis consisted of descriptive statistics, t-tests (to compare mean values for the two industries; i.e., tourism and hospitality and culture) and regression analyses (to assess the impact of enjoyment and content quality on intention to comply in the two industries).

Table 1. Profiles of the participants

Variables		Frequency	
	Tourism & Hospitality (n=341)	Culture (n=208)	Total Sample (n=549)
Gender			
Female	152	135	287
Male	189	73	262
Age			
18–25	90	21	111
26–35	114	33	147
36–45	90	53	143
46–55	37	56	93
56–65	8	33	41
>66	2	12	14
Education			
Middle school degree	3	4	7
High school degree	79	38	117
Bachelor's and/or Master's degree	202	108	310
Doctoral or other post-graduate degrees	57	58	115
Occupation			
Student	89	27	116
Employee	155	64	219
Homemaker	2	8	10
Self-employed	80	85	165
Unemployed	15	24	39
Frequency of visits to the blog			
At least once per day	98	31	129
At least once per week but less than once per day	85	116	201
At least once per month but less than once per week	44	46	90
Less frequently	15	15	30

RESULTS

Analysis of the mean values (Table 2) revealed that the intention to comply with the suggestions of the blog was high (mean value: 5.2756) and that it was not statistically different ($p>0.05$) between travel and cultural blogs' followers. Moreover, for both industries the mean values for content quality were higher than the mean values for enjoyment, emphasising the perception of blogs as trusted sources of information. A more in-depth examination of the data revealed interesting differences across the two groups. In fact, perceived enjoyment is statistically greater for tourism and hospitality than for cultural blogs (5.6088 vs. 5.2420, $p<0.01$). Conversely, perceived content quality is higher for cultural than for

Table 2. Descriptive statistics and t-tests

	Total Sample (Mean Values)	Tourism & Hospitality (mean values)	Culture (Mean Values)	Level of Significance
Enjoyment	**5.4393**	**5.6088**	**5.2420**	**p<0.01**
Following the blog is pleasant	5.7556	5.7686	5.7404	p>0.05, n.s
Spending time on this blog is relaxing	5.3156	5.4793	5.125	p<0.05
I enjoy following this blog	5.2467	5.5785	4.8606	p<0.01
Content quality	**5.8817**	**5.7469**	**6.0385**	**p<0.01**
The information provided by this blog is accurate	5.8289	5.6942	5.9856	p<0.05
The information and suggestions published in this blog are reliable	5.8756	5.6446	6.1442	p<0.01
The content of this blog is updated	5.9556	5.8843	6.0385	p>0.05, n.s
This blog provides high-quality information	5.8667	5.7645	5.9856	p>0.05, n.s
Intention to comply with the suggestions of the blog	**5.2756**	**5.3988**	**5.1322**	**p>0.05, n.s**
In the future, I will consume the products suggested by the blog	5.0667	5.2479	4.8558	p<0.05
When I have to choose cultural products to consume, I will take suggestions from the blog	5.4844	5.5496	5.4087	p>0.05, n.s

tourism and hospitality blogs (6.0385 vs. 5.7469, p<0.01). A more nuanced view of these differences can be obtained by examining the mean values for each item. For example, it was noted that the difference regarding content quality was due to perceived differences in content reliability and accuracy, but not in their frequency of updating.

To test our hypothesis on the mechanisms behind followers' intention to comply with the suggestions provided by the blog we conducted three linear regressions (first for the whole sample and then for the two sub-samples) setting enjoyment and content quality as the predictors of the intention to comply. The results (shown in Table 3) highlighted that both enjoyment and content quality have strong effects on followers' intention to comply. Therefore, Hypothesis 1 is supported. However, the analysis also revealed that the effects of the two independent variables varies across the two industries. In fact, in tourism and hospitality, enjoyment has a stronger impact than content quality (β=.513 vs. β=.401), while in cultural industries the magnitude of the two effects are reversed (β =.239 vs. β=.578). These results are discussed in the next section.

DISCUSSION

Overall, the results highlight that bloggers have a marked influence on their followers' behavioural intentions and particularly on the intention to consume the products suggested in the blog. In addition, the analysis shows that blogs are perceived to have higher content quality than level of enjoyment. This result is consistent with the increasing tendency of customers to rely on blogs because they are considered

Table 3. Results of the linear regressions

Variables	Standardised Beta		
	Whole Sample	**Tourism & Hospitality**	**Culture**
(Constant)	.000	.066	-.136
Enjoyment	.356*	.513*	.239*
Content quality	.502*	.401*	.578*

*p<0.01; dependent variable: intention to comply.

very credible (Cosenza et al., 2015). At the same time, enjoyment receives lower, although still high, evaluations, indicating that the experiential value aroused by the blog is not of secondary importance.

When moving from the average ratings attributed by followers to the statistical relationships among variables, the analysis reveals mixed findings. In fact, in the case of the cultural industries, content quality is the strongest predictor of followers' intention to comply with the suggestions of the blogs, while in the tourism and hospitality industries enjoyment emerges as the most important antecedent. These mixed findings seem to suggest that the mechanisms behind the ability of influencers to shape their followers' behavioural intentions may vary depending on the context. These results may be explained by considering previous studies that have reported that it is difficult for the wider public to find accessible information on cultural products (Gonzalez, Llopis & Gasco, 2015; Peltoniemi, 2015). Hence, many consumers may find it difficult to understand cultural products and to decide which to select (Brito & Barros, 2005). Cultural blogs can effectively fill these communication gaps, and are well regarded by their followers, above all for the information they provide. In the tourism and hospitality industry, consumers usually have access to large amounts of information from multiple sources, such as destination marketing organisations (DMOs), tourism businesses (e.g., hotels and restaurants) and other travellers (Llodrà-Riera, Martínez-Ruiz, Jiménez-Zarco & Izquierdo-Yusta, 2015; Moretta Tartaglione, Berné Manero & Vicuta Ciobanu, 2018). In this context, one of the main issues for consumers is to deal with this information overload and to filter contents (Choi, Lehto & Oleary, 2007). Therefore, blog followers' need for accessible information may be less urgent than in the cultural industries. At the same time, in the hospitality and tourism industry there is strong evidence that novelty triggers enjoyment (Mitas & Bastiaansen, 2018). Therefore, reading about something new (e.g., new tourism experiences and new places) may create enjoyment. Overall, the mixed findings on the impact of content quality and enjoyment suggests that the mechanisms behind social media influencers' impacts may vary depending on the specific industry.

Implications and Guidelines for Bloggers

Several practical implications may be derived by interpreting the findings of this research and by enriching them with the results from previous studies to gain a broader view of social media influencers' effectiveness. First, content quality is strongly related to the credibility of the blogger, which in turn is linked to the perception that she/he provides independent recommendations. Therefore, even when collaborating with sponsoring firms and organisations, bloggers should take care to maintain their independence. In fact, when followers perceive that a blogger is acting mostly, or only, for commercial purposes, they

are likely to experience emotional reactance (Brehm & Brehm, 1981). As demonstrated by extensive research, when a person feels that her/his freedom is restricted by manipulative advertising or unsolicited product recommendations he/she will develop a negative attitude towards the source of the solicitation and act to restore the restricted freedom (Clee & Wicklund, 1980; Fitzsimons & Lehmann, 2004; Magno, Cassia & Bruni, 2018). In short, the follower will develop a negative perception of the blogger and will no longer comply with her/his suggestions. Similarly, firms and organisations (museums, DMOs and others) interested in cooperating with bloggers should avoid interfering with bloggers' independence; for example, by imposing a certain writing style. In such cases, followers will easily recognise that the blogger is not sincere and will develop negative attitudes towards the sponsoring firm or organisation as well. More generally, bloggers should avoid focusing only on content quality and deliver a balanced mix of enjoyment and high-quality information. As shown in this study, the hedonic dimension of enjoyment is fundamental to establishing an emotional link between the blogger and her/his followers, which enhances followers' intentions to comply with the recommendations provided in the blog.

Drawing on these premises and on the previous studies reviewed in this chapter, the following set of guidelines for bloggers can be suggested:

- Focus on originality and content quality: these are two important aspects that help not only to attract the attention and establish a unique positioning in the *mare magnum* of the blogosphere, but also to engage the readers. Bloggers should try to offer contents that nobody else offers. On this point, it is important to avoid being long-winded and to express personal knowledge, passion and ideas in a clear and simple way.
- Update the contents constantly: this is the way to make reading the blog a pleasant routine.
- Be consistent and honest: the blog should transmit the idea that the blogger is an authority on a particular topic. The readers must be sure that they can find content they need in the blog. At the same time, bloggers should not be formal or professional to impress their readers. It is important to be honest and transparent with their audience, in this manner readers develop trust in the blog and the blogger. It is useful for a blogger to talk about herself/himself, his or her own personal experiences, sensations and emotions. In this way the readers can understand the blogger as a person.
- Interact with the readers: to create the sense of belonging to a community, it is fundamental to interact with followers and respond to their comments and suggestions, thus communicating the value that the readers have for the blogger.

Finally, from the perspective of firms interested in using influencer marketing, it should be noted that this is a relatively low-cost strategy compared to traditional advertising. Therefore, it is accessible and particularly suited to small- and medium-sized enterprises (SMEs). In particular, SMEs are recommended to cooperate with micro-influencers, who are particularly effective in engaging specific segments and niche markets.

CONCLUSION

Despite the rapidly growing popularity of social media, digital influencers and influencer marketing, academic research on this topic is still in its infancy. This chapter has contributed to advancing our

knowledge on this topic by reviewing the available literature and providing new empirical evidence about bloggers' effectiveness in the tourism and hospitality and cultural industries. Overall, the analysis showed that bloggers actually have significant influence on the consumption decisions made by their followers. At the same time, the findings revealed that the recipe for the ability of bloggers to influence their followers' decisions may vary depending on the industry, requiring different combinations of content quality and enjoyment. Finally, the chapter has offered a set of actionable guidelines for bloggers wishing to become effective influencers.

While offering novel insights about social media influencers, this chapter has some limitations. First, the empirical evidence used for the analysis was collected only in two industries, namely tourism and hospitality and culture. Considering influencers from other contexts, such as fashion, sport or cookery may be useful to gain a more in-depth understanding of the blogger–follower influence processes. In fact, as some differences have emerged from our comparison of tourism and hospitality blogs with cultural blogs, new factors and details may be identified by studying blogs from other industries. Moreover, the study addressed only one specific type of social media influencers: bloggers. Other types of social media influencers (e.g., YouTubers) should be considered to obtain more generalisable results. Similarly, data were collected from only one country (Italy), requiring future comparisons with other countries to appreciate possible cultural effects (Moretta Tartaglione, 2018) such as those due to individualism and collectivism (Hofstede, 1983). Finally, the data collected provided a snapshot of followers' attitudes and behavioural intentions but did not register how the influence processes evolved over time. Therefore, it is recommended that future studies adopt a longitudinal perspective to appreciate how the relationships between social media influencers and their followers are established, enhanced or destroyed.

In addition to the suggestions provided above, other avenues of future research are suggested that promise to advance our scientific and managerial knowledge of this phenomenon. First, as the consumer's decision-making process is composed of multiple stages, it may be useful to understand when and how social media influencers impact this process. For example, when purchasing a tourism product, a consumer usually first decides on the destination and, after that, she/he selects the service providers at the destination (e.g., accommodation providers). In this specific case, future research could assess whether social media influencers are more persuasive for the selection of the destination than for the selection of service providers, or vice versa. Moreover, evaluating whether followers' responses vary depending on their loyalty to the influencer represents another opportunity for further studies. Finally, firms and organisations evaluating whether to cooperate with social media influencers are interested to understand the returns from such investments. In fact, as with every marketing expenditure, the effectiveness of this marketing action should be estimated and compared with the effectiveness of alternative marketing programmes to optimise resource allocation (Bruni, Cassia & Magno, 2017; Homburg, Artz & Wieseke, 2012; Magno, Cassia & Bruni, 2017). Therefore, future studies should try to identify the most important metrics and data collection practices needed to quantify to what extent cooperation with influencers affects followers' attitudes, and, above all, their actual purchases. In addition, future research could develop more complex models relying on established measurement scales and test them with the support of covariance-based or partial least squares structural equation modelling to gain a more nuanced understanding of influencer marketing effectiveness.

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KEY TERMS AND DEFINITIONS

Destination Marketing Organization (DMO): An organization that aims to promote a place as an appealing destination for tourists and to attract businesses.

Followers: People on social media who decide to see/receive contents created and shared by people they have selected (particularly by influencers).

Lurkers: People who read the online contents but do not actively participate in creating them.

Posters: People who actively participate in generating online contents.

Social Media Influencers (or Digital Influencers): People who influence their audience's attitudes and behaviors by creating and sharing contents through social media.

User-Generated Content (UGC): Online contents created and diffused directly by the users, who are not necessarily expert professionals.

Chapter 10
Strengths of Online Travel Agencies From the Perspective of the Digital Tourist

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ABSTRACT

Recent tourism literature reviews the movement of the current distribution landscape toward disintermediation as the Internet and mobile technologies provide consumers with more and more tools for researching suppliers/providers and purchasing products and services directly. This calls into question the necessity and role of retailers in the industry. Focusing on online travel agencies (OTAs), this chapter is aimed at solving three main research questions: What is the current position of online tourism retailers as indirect channels in the online tourism distribution system? What are the strengths of OTAs as seen by their customers? and How should OTAs face the future? A database drawn from a survey of Spanish digital tourists is used to illustrate the initial theoretical discussion and concluding remarks.

INTRODUCTION

The global financial crisis, which broke in 2008, created a complex and challenging economic scenario across many sectors. In this context, advances in Information and Communication Technologies (ICTs) represent an opportunity rather than a threat to sectors such as tourism, a key sector in many countries. The strong performance shown by European travel and tourism companies in 2017 reflects a positive

economic trend and strong confidence in the sector (ITB World Travel Trends Report 2017). Tourism agents have invested in ICT to develop more efficient production and distribution processes. The Internet has significantly transformed the travel industry over the last 20 years (Webb, 2016), as traditional suppliers and intermediaries extend into the online environment. Since the onset of the Internet in the 1990s, most new entrants to the sector have approached it through electronic means (online travel agencies, OTAs) (Berné et al., 2015a). The growing group of "OTAs only" has contributed substantially to the observed changing structure of the tourism sector (Stangl et al., 2016). OTAs are acknowledged as key agents in travel distribution because they provide a reliable and effective platform for consumers to purchase trips and share information about their experiences (PhoCusWright, 2014).

A highly changing environment has forced all tourism agents into a continuous process of adaptation requiring agility in order to survive and thrive. Remaining competitive in the e-business era means adapting technologically (Law et al., 2015). Increasing rivalry within the sector has led to successive power shifts among the main players.

Attempts to explain changes in the tourist distribution system have focused on comparing power positions between direct and indirect channels (Berné et al., 2012). One analysis describes the transition from the pre-ICT situation of domination by intermediaries, to disintermediation as direct channels improved their power positions, and a final return to intermediation (re-intermediation).

A recent report by Beritelli & Schegg (2016) suggests that the growing complexity of the online tourism distribution environment is testing managers across the entire industry. Nevertheless, this is a highly dynamic sector, capable of reacting to the challenges posed by the behaviour, wishes and needs of consumers, technological developments, and competitive pressures. Hence we find that, by 2010, PhoCusWright reported faster growth in the online travel market than in the market as a whole. OTAs have been increasing their dominance since the very onset of online distribution services (Runfola et al., 2013), in part by offering more product choice (Beritelli & Schegg, 2016).

Meanwhile, overall demand for travel is strong and rising (Floater and Mackie, 2016), with a particularly significant increase in online purchases of tourist products and the creation of efficiencies for digital tourists, seen as operant resources from the Service-Dominant Logic perspective (Vargo & Lusch, 2008), since they create an impact as co-producers (Shaw et al., 2011). Single-exchange transactions are transforming into relationships wherein value is created through the interaction process itself (Gronroos, 1990; Etgar, 2008). Lusch et al. (2007) stress the difference between value delivery (Goods Dominant Logic) and value creation.

Thus, co-production is evolving into co-creation, especially in terms of product innovation; and firms can obtain competitive advantage by bringing their customers and value network partners on board (Shaw et al., 2011). This business-consumer relationship, which benefits both parties, is difficult to manage because it involves integrating the resources, interests and expectations of service providers and users (Chathoth et al., 2013).

The trend towards growing numbers of proactive consumers, driven by the online distribution channels, has been identified by tourism companies as one of the main influences on their strategies and operations. Therefore, distributors who use ICTs to tailor their products to customer needs will be able to increase their market power (Berné et al., 2012).

Recent literature reviews the movement of the current distribution landscape toward disintermediation as the Internet and mobile technologies provide consumers with more and more tools for researching suppliers/providers and purchasing products and services directly. This calls into question the necessity

and role of traditional intermediaries in the industry. While some investigations (e.g. Law et al., 2015) support perceived disintermediation among professionals in the tourism industry, others claim that disintermediation has not come about as predicted, but more as a consequence of the market entry of OTAs, and the response from hospitality managers (e.g. Myung et al., 2009; Stangl et al., 2016).

Focusing the discussion on OTAs, three main questions arise:

- What is the current position of online tourism retailers as indirect channels in the online tourism distribution system?
- What are the strengths of OTAs as seen by their customers?
- How should OTAs face the future?

A review of related literature provided some theoretical and practical ideas for this analysis, which follows a description of the main players and observed developments in the online tourism industry. The study variables are perceived cost-benefit factors, including utilitarian and hedonic attributes of website quality, monetary and non-monetary transaction costs, satisfaction with last transaction, cumulative satisfaction, and repurchase intention. A database drawn from a survey of Spanish digital tourists is used to illustrate the initial theoretical discussion and concluding remarks.

THE ROLE OF DIGITAL TOURIST

Strong growth in online tourist booking has created efficiencies for digital tourists, who were considered as operand resources in goods-dominant logic, while they represent operant resources for the value creation as claimed by the more recent framework of service-dominant logic (Vargo and Lusch, 2008). Digital consumers, seen in the literature as potential value co-creators (Fodor and Werthner, 2005; Ahn et al., 2007) are demanding interaction with the company, moving towards connectivity, transforming from passive recipients to active participants (Prahalad & Ramaswamy, 2004, 2013), and starting to communicate their experiences (Okazaki et al., 2011). Chathoth et al. (2013) speak of a continuous process from co-production to co-creation through the active participation of the customer in the development of innovations.

With growing customer participation in production and distribution processes, success depends on how well supply can be adjusted to demand, which face the management of a closer relationship.

According to Toh et al. (2011), when viewed from the customer perspective, the four main reasons for the growth of the Internet as a booking channel are that i) it is a valuable channel for intangible goods, ii) customers expect goods sold online to be cheaper, iii) it enables quicker price comparisons and lower search costs, and iv) customers can bypass travel agencies and connect directly with the seller. Customer evaluation of differences in product characteristics is particularly significant (Shaw et al., 2011).

Travel booking behaviour has changed substantially over the past two decades. The traditional approach through travel agents and booking ahead has evolved into a fast-paced, last-minute booking environment facilitated by ICTs. Forecasting, pricing and online travel agency inventory allocations have changed and turned understanding of the consumer booking process into a necessary requirement for success (Webb, 2016).

THE ROLE OF ONLINE TOURISM SUPPLIERS AND INTERMEDIARIES

The application of the Internet over the past three decades has steadily transformed the way products and services are distributed to customers (Berné et al., 2012). As travellers have learned to skip intermediaries and book directly through supplier websites (Kaewkitipong, 2010), traditional wholesalers have had to protect their positioning, as other wholesale agents, search engines and meta-search engines have appeared on the scene. Meanwhile, OTAs and other online intermediary models, such as last-minute inventory distribution and flash sale websites, have recently emerged (Law et al., 2015).

The following description of the current roles of basic online tourism service providers includes suppliers representing the direct channel, and search and meta-search engines, and retailers (OTAs) representing indirect channels, the former longer than the latter.

Suppliers

Recent literature reviews the shift in the current distribution scenario toward disintermediation enabled by the Internet and mobile technologies, which are the tools that consumers use to view their options and purchase directly from suppliers. It is questionable whether there is still a role for traditional intermediaries in the hospitality and tourism industries, where there is strong pressure toward disintermediation (Law et al., 2004; Lawton & Weaver, 2009). Internet and mobile technologies enable consumers to use direct channels and motivate suppliers to shift to direct digital product and service delivery (Thakran & Verma, 2013; Morosan, 2014). This is clear evidence of disintermediation among tourism industry practitioners (Law et al., 2015).

Meanwhile, suppliers, such as hotels, can increase their visibility through OTAs while leveraging on social media communication and innovative technology to manage room bookings through hotel-owned booking engines (Law et al., 2015).

According to service providers interviewed by Law et al. (2015), travel agency managers agree that the Internet has changed their role within the sector, and hotel managers recognize the power of the digital environment for reaching potential guests at a low distribution cost by playing an active role in marketing and promotion. While hotels still rely on travel agencies for the promotion and sale of hotel rooms, especially during off-peak seasons, their profit margin is eroded by price transparency on the Internet. This has strengthened the backup role of travel agencies in helping travellers to organize their trips. Differences between products, experience levels and countries may be observed (Stangl et al., 2016). For example, hotels not focused on tour groups will gain more online share, and new ones will be eager to attract business by using cutting-edge technology, while existing hotels may need to sacrifice some traditional channels or market segments to expand their online markets. Thus, many hotel websites offer very competitive room rates; and their direct booking ratios are likely to increase as they connect directly with their customers while saving on fees paid to OTAs (Law et al., 2015).

Nevertheless, large-scale mergers of small-scale travel agencies and hotels are highly possible. Travel agencies can minimize the risk of disintermediation by identifying and focusing on the niche market (Almunawar et al., 2013), improving online marketing and handling reputation management through the Internet. A major concern is how travel agencies will respond or react to changes that could lead to further disintermediation.

Meanwhile, the disintermediation predicted by authors such as Stangl et al. (2016) has not come about. Indeed, Myung et al. (2009) among others announced a return to intermediation owing to the market entry

of OTAs and the response from hospitality managers. Currently, a huge number of direct and indirect online channels coexist alongside traditional distribution channels. This is hailed as an advantage, as it enables suppliers to extend their market to price-sensitive customers and restores effectiveness to the entire channel (Sarmiento, 2016). The main problems are those facing very small, independent suppliers, who must prepare to diversify their services, acquiring personalized software, integrating ICT systems and balancing costs with capabilities (Cetin et al., 2016; Sarmiento, 2016).

Search and Meta-Search Engines

With respect to the development of direct booking facilities, TravelTechMedia (2018) predicts significant further growth for players in the online travel sector. The report claims that meta-searches have positioned themselves as direct competitors of OTAs. Search engines (such as TripAdvisor) and meta-search engines (such as Kayak or Trivago) expand the channel by enabling attribute comparison and redirecting users to the OTA website to complete their purchase. Potential buyers are able to select and compare the different search result sites. Meta-search engines represent the next step in the evolution of travellers' search and purchasing processes, but they neither process booking transactions nor provide the full range of services and destination content typically found on an OTA site (Christodoulidou et al., 2010).

According the aforementioned report, Trivago ranks highest in terms of marketing costs as a percentage of revenue (95%) for the last quarter. TripAdvisor is shifting from performance marketing, with more immediate impact, to brand-building channels (TV) to drive the message that the company covers not only research needs but also price comparisons and actual bookings, thereby diversifying their business in a quest for differentiation and positioning. Meanwhile, Trivago's largest advertisers are reducing their ad spend on Trivago in favour of other channels, thus forcing Trivago to diversify its advertiser base by focusing on the long tail.

OTAs

While traditional travel agencies still play a role (albeit a small one) for certain customer groups, (Del Chiapa, 2013; Law et al., 2015), the digital environment presents an opportunity rather than a threat to tourism e-retailers, who are forced to provide online booking services if only to keep pace with competitors (Hung et al., 2011; Berné et al., 2015b).

OTAs, by definition, transform a fragmented supply structure into a single distribution platform. The growing group of "only-OTA" intermediaries, which first emerged in the 1990s, has contributed to structural changes posing a range of challenges for hoteliers (Stangl et al., 2016). Based on the number of pages viewed by users, Murphy and Chen (2016) found that online travel agencies play a bigger role than search engines and travel-related social media.

Among prior contributions, Stangl et al. (2016, p. 10) summarize OTAs' strengths as follows: i) they receive a large portion of their inventory from hotels, often at discounted rates (Carrol & Siguaw, 2003); ii) they sell products from several suppliers, thus allowing consumers to purchase the whole travel experience in a "one-stop-shop" (O'Connor & Frew, 2002); iii) they are able to create economies of scope, aggregate several products into a combined offer and reduce costs to provide final consumers with cheaper solutions (Kim et al., 2009); iv) they apply different business models, which enable them to offer better deals than those available on hotel websites (Gazzoli et al., 2008); and, finally, they use

knowledge gained through data mining to tailor direct mail campaigns and loyalty programs accordingly (Toh et al., 2011).

Although mobile technology could enable OTAs to enhance their online service distribution through own websites and social networks, these are not yet seen as a recognized business strategy. The approach is still limited in terms of coverage, and adjustments in managerial planning would be required to make fuller use of social media technology (Stangl et al., 2016).

Currently, with the exception of eDreams-Odigeo, online travel companies' investments remain heavily focused on short-term growth, mostly through performance marketing, and on long-term revenue potential (brand marketing). Priceline, the world leader in online travel, pours most of its budget into brand marketing (Travel TechMedia, 2018).

THE VALUE CHAIN MILESTONES: SUPPLY-DEMAND INTERACTION

The interaction between supply and demand will be explored through the variables involved in the cost-benefit chain, thus enabling analysis of company performance from the customer perspective.

Website Perceived Quality

Before making an online booking decision, consumers try to adjust their expectations to meet the perceived product-service quality provided by online tourism agents, including suppliers, search, meta-search and online travel agencies as retailers. Satisfactory adjustment could lead to a purchase decision that would affect the results of a market-oriented company (Grissemann & Stokburger-Sauer, 2012).

The main channel of communication between service providers and consumers is the website (Ali, 2016). Ruiz-Mafe et al. (2018) note that, consumers making tourism bookings through an online community are generally unable to make value judgements prior to purchase through lack of product quality information. Customers purchasing online through the website of a tourism provider or an intermediary, however, have a range of attributes on which to base quality assessments. Perceived quality is a performance rating parameter for comparing tourism organizations, destinations, hotels and travel agencies (Hao et al., 2015). Perceived website quality depends on how well website features are found to meet consumers' needs and reflect overall excellence (Chang & Chen, 2008). Wang et al. (2015) compare the website to an online store whose attributes determine the customer's purchase decision. Perceived quality in e-commerce -focusing mainly on website purchases- has been defined as a multi-dimensional construct (Ahn et al., 2007). There is no unanimous definition, however, and different contributions propose different dimensions and measurement scales for this variable.

Most of the research on this topic (e.g.Kaynama & Black, 2000; Law & Leung, 2000; Kim & Lee, 2004; Kim & Lee 2005; Ho & Lee, 2007; Chang & Chen, 2008; Hernández et al., 2009; Wang et al., 2015) has focused on utilitarian issues, confirming these as the essential drivers of user-perceived website quality, and identifying various dimensions, mainly relating to ease-of-use, information and customer service (e.g. Kaynama & Black, 2000; Madu & Madu, 2002; Kim & Lee, 2004; Kim et al., 2005; Park et al., 2007). Usability, functionality and security-privacy are the three dimensions of website hotel quality confirmed by Ali (2016).

Empirical applications have tended to avoid hedonic attributes or use indirect indicators such as website design (García & Garrido, 2013), a utilitarian attribute recalling visual appeal (Park & Gretzel,

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2007), perceived sociability of use (Barnes & Vidgen, 2014) and perceived flow (Ali, 2016), defined as the unfolding of a pleasant experience, and observed as a mediator between utilitarian quality and satisfaction, rather than a specific dimension of website quality. Lately, however, hedonic factors might have gained importance for digital consumers. Increasing experience and familiarity with online channel operations, and a growing role as co-producer, are potential determinants of more pleasant online purchase experiences for the e-customer. Park et al. (2007) do not confirm the direct indicators of visual appeal as a determinant of firm performance, but recent references have provided some insight into the issue. Thus, in the context of online airline ticket purchases, Llach et al. (2013) identify website hedonics as a determinant of perceived value, defining hedonic quality as an intrinsic value relating to the enjoyment of seeking information and purchasing. Hedonic value is measured through five indicators of enjoyment from visiting the website, using the information provided, and interacting with other users. Although the authors do not propose a second order variable, their results are enlightening, and their observed correlation between the hedonic and functional attributes of hotel website quality (based on E-S-QUAL model by Parasuraman et al., 2005) might suggest a possible new approach to the dimensionality of perceived website quality. Ali et al. (2016) extend the previous model and confirm perceived hotel website quality as a second order latent variable reflected in functional and hedonic dimensions. Ozturk et al. (2016) research the antecedents of continued use of mobile devices as a medium for interaction as hotel customers. Their model includes the utilitarian and hedonic values of mobile use as direct drivers of reuse. They measure hedonic attributes through three indicators relating to fun and pleasure from using mobile devices.

Thus, both utilitarian and hedonic attributes are key components of perceived website quality for digital tourists. Greater online experience, continued learning, and a growing role as co-producer and, potentially, co-creator, might support higher relevance of the pleasure and wellbeing derived from the online purchase experience.

In short, therefore, higher perceived quality in online tourism distribution services can be expected to raise customer satisfaction levels.

Customer's Satisfaction

The second milestone in the value chain is customer satisfaction, defined as an attitude developing from repeated (dis)confirmation of product and/or service performance expectations (Oliver, 2010). Although the definition of customer satisfaction varies throughout the marketing literature, the broad consensus is that it invariably involves a goal that the consumer wishes to achieve (Ali et al., 2016).

Customer satisfaction is considered one of key marketing objectives of all market-oriented tourism companies (Kandampully & Suhartanto, 2000). Research on traditional tourism distribution (González et al., 2007; Yüksel et al., 2010; Chen & Xiao, 2013; and Deng et al., 2013), relates service quality to expectations, satisfaction and loyalty. In the online context, Kim & Lee (2005), Park & Gretzel (2007), and Hao et al. (2015), among others, find that website quality ratings relate to level of satisfaction with the experience. Llach et al. (2013) discover a positive link between website quality and perceived value, defined as the customer's product/service evaluation based on the balance between perceived benefits and costs (Zeithaml, 1988). This very similar definition of satisfaction also requires customer experience with the service (purchase interaction). Ali (2016) extends this model to include perceived value, confirming its role as a mediator between website quality, satisfaction and hotel rebooking intention.

In any case, satisfaction is expected to be a loyalty determinant.

Repurchase: Loyalty Intentions

Moving on to the links in the value chain, the reason for pursuing customer satisfaction is that it leads directly to repeat behaviour and profits (Ali et al., 2012; Ryu et al., 2012). It also increases loyalty intentions, including the probability of posting positive recommendations (Oliver, 2010) and making a repeat-purchase (e.g. Finn et al., 2009; Chiu et al., 2014; Betancourt et al., 2017). The study of this relationship in online tourism is more recent. Amaro & Duarte (2015) drew attention to potential satisfaction with online travel purchases to explain re-usage intentions. Ali (2016) and Ali et al. (2016) confirm satisfaction as a direct driver of hotel booking intention. This is a key objective for successful customer retention strategies and, ultimately, long-term firm survival.

Perceived Transaction Costs

Due, mainly, to increasing consumer participation in online tourism production and distribution processes, digital consumers' perceived transaction costs may notably influence relationships among the key variables in the value chain, and enlighten research into online purchase processes.

Satisfaction assessment requires the quantification of post-service impressions, that is, a cost-benefit comparison (Cronin and Taylor, 1992, Berné et al., 1996). Thus, both the perceived quality and perceived transaction costs of an online purchase should be covariant with the level of customer satisfaction. In this respect, Jiang & Rosembloom (2005) observe that favourable price perceptions have, overall, a direct, positive impact on customer satisfaction and return intention. Han & Ryu (2009) state that perceived reasonable price acts as a moderator enhancing the impact of quality on customer satisfaction.

Price plays an acknowledged key role in forming purchase decisions (Krishnamurthi & Raj, 1988) and price sensitivity has been linked to customer satisfaction, in the sense that higher satisfaction ratings enable firms to set higher prices (e.g. Zeithaml et al., 1996; Cronin et al., 2000). Price, which is a typical cue for service performance expectations, also shapes customer attitudes and behaviour (Han & Ryu, 2009). While the laws of economics dictate a positive relationship between perceived quality and monetary costs (higher quality meaning higher price), customer satisfaction and costs are expected to be negatively related.

The co-creation process can contribute significantly to reducing firm costs by involving the customer in parts of the production process (Ahn et al., 2007). Recently, a deal-seeking culture has evolved in which the consumers track price fluctuations in order to determine the best time to buy. Thus, the purchase value of travel products may largely depend, not on the product offering, but on price (Carroll and Siguaw, 2003). Meanwhile, channel choice is strongly influenced by consumer ratings. Direct channels, in particular, can reap profits from customers with a brand preference if demand and customer ratings are high, and opaque sales can be used to boost interest in the products, and thus enable price hikes (Jerath et al., 2010).

In terms of costs, Schwartz and Chen (2012) argue that the purchase decision is fuelled both by utilitarian (need to book a room) and hedonic motives (enjoyment at finding the cheapest rate). In the traditional booking environment, customers were led by utilitarian motives to make the purchase decision as soon as they decided to travel. In the current deal-seeking culture, however, the price transparency offered by OTAs further enables customers to fulfil hedonic goals. Llach et al. (2013) conclude that

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hedonics is an intrinsic dimension of e-quality, but identify efficiency as an even stronger contributor. They also find e-quality and hedonics to be significantly related with loyalty through perceived value.

Further investigation into linkages between booking decisions, trends and influencers will lead to more effective revenue management tools. Deeper insight into consumer behaviour will inform revenue-optimization decisions and strategies. Pricing strategy is key in the research on ways of adapting to the changing environment. Mobile technology and apps, for example, will enable the tracking of individual booking behaviour and willingness to pay (Webb, 2016).

The new co-producer, even co-creator, customer could face higher costs as an operand and an operant resource (Vargo & Lusch, 2008), particularly in online purchase decisions. However, Etgar (2006, 2008) argues that cost reduction could be an essential trigger for co-creation, and Ahn et al. (2007) state that customer participation, through co-creation, can reduce costs for the company.

Note, here, that the literature distinguishes between the monetary costs (price of the service) and non-monetary costs (time and effort) perceived by the digital tourist during the transaction. Hann and Terwiesch (2003) mention greater cognitive effort, perceived difficulty (Verhoef et al., 2007), and the opportunity cost of time involved in online purchase decisions. Although some studies envisage much higher non-monetary costs in co-production processes, the digital tourist may be willing to accept them in exchange for lower prices. However, there is a large gap in the knowledge regarding the extent and influence of non-monetary costs in the quality-satisfaction-loyalty value chain.

Cho & Agrusa (2006), in this respect, acknowledge that price influences purchaser perceptions both positively and negatively. Kim et al. (2011) identify monetary transaction costs as an antecedent of satisfaction among Korean purchasers of online tourism services and as an indirect determinant of trust and loyalty through satisfaction. In a hotel context, Ye et al. (2011) find that perceived price has a negative impact on perceived value. Analysing Spanish OTAs, García & Garrido (2013) find moderate correlation between prices and some website attributes (simplicity, clarity and customer service) relating it to ease of online price comparison, which could increase customer price sensitivity (Cho & Agrusa, 2006).

ILLUSTRATING THE THEORETICAL DISCUSSION

The primary data source used to illustrate the above theoretical discussion is a survey of Spanish digital tourists having had a purchase experience with an online tourism business over the last twelve months. Specific information on the respondent's last such experience was drawn from a structured questionnaire distributed to a quota-based e-consumer panel provided by a market research company. After a checking process, 408 valid questionnaires were obtained.

The questionnaires are sorted, by choice of booking channel, into three groups: OTAs, search and meta-search (indirect online channels), and suppliers' customers (direct online channels). The empirical analysis focuses on the overall sample statistics and an ANOVA-test considering the three reported online tourism channels. The results are expected to reveal differences between channels potentially reflecting customer perceived differentiation.

Usage of online tourism booking channels, ratings of last service and experience provided, perceived website quality, level of satisfaction, and repurchase intentions were explored by collecting respondents' level of agreement with affirmative statements, which they indicated on an 11-point Likert scale, where

0 = least favourable and 10 = most favourable in terms of overall adequacy, much easier, much lower prices, totally satisfied, yes-always. The variables were measured by indicators widely used in previous studies, aiming at simplification while also addressing the different nuances of each variable.

Thus, the measurement of perceived website quality includes the indicators most commonly used in the literature, three of which refer to utilitarian quality (ease of use, information provided and customer service) and one to hedonic quality (website appeal); this last measured overall on a points-scale from very low to very high, following Sauro (2015).

Satisfaction is measured through two indicators of the experience with the contracted company: one focused on the short term, that is, satisfaction with last transaction conducted, and the other on the long term, that is, cumulative experience with the company. Perceived transaction costs are measured by three indicators: two for assessing the online versus the physical option and a third for measuring perceived effort required of the user. Attitudinal loyalty is measured by two items: one for probability of recommendation and another for repeat-purchase intention (Table 1).

The sample comprises 50.7% men and 49.3% women, a higher percentage (70%) of individuals over the age of 30, and over 50% with higher education. Almost half the sample members fall within the age range of 31-55, with the rest distributed fairly equally between the youngest segment (18-30 and the oldest (55+). 51.9% have used the Internet mainly for travel purchase purposes and as a means to buy their trips, and are university and higher educated. This is consistent with profiles reported by Pascual et al. (2011). In terms geographical origin of respondents, Madrid (19.6%), followed by Catalonia (18.1%), Andalusia (14.5%) and the Community of Valencia (10%) are the most represented autonomous communities. This matches the population distribution in Spain.

Online Tourism Channel Usage

The grouped responses reveal a preference for the online option. 32.4% of the sample report making more than 80% of their purchases online. Of these, 13% use electronic means exclusively. Only 25% of the total sample report more intense usage of traditional than digital media.

The highest usage frequencies are reported for Booking (14.5%), eDreams (10.8%), El Corte Ingles (10.3%) and Rumbo (7.1%). This largely coincides with Sarmiento (2016) which cites Booking, eDreams and Rumbo as the online travel agencies most frequently named by Spanish survey respondents. These data are also consistent with the current level of firm concentration in the sector: first and second of the top 5 in the Hosteltur Ranking for Online Agencies are two mega-groups resulting from international mergers (Odigeo-eDreams and Bravofly-Rumbo).

The companies most often named as that of respondent's last booking/purchase are: Booking (14.2%), El Corte Inglés (9.3%), Rumbo (8.8%) and eDreams (8.8%). The total sample comprises OTAs (180 cases), suppliers (145 cases), and search/meta-search engines (83). Half the sample maintained a customer relationship of more than two-years with their last tourist service provider. Regarding purchase completion time, most use a maximum of 60 minutes (89.2% of the sample; approximately half less than 30 minutes and the other half between 30 and 60 minutes). 71.6% of the sample report making more than 50% of their purchases with their last online tourist service provider. The average cost of the last transaction is 537.3 euros (maximum spend: 40,000). Average accumulated expenditure over the last year is 1,216.36 euros (maximum spend: 20,000).

Table 1. Criteria, items and prior references

Criteria, Items	Prior References
Ease-of-use Ease of access to the website. Availability of combined booking option. Perceived clarity of website product and service identification. Perceived clarity (absence of ambiguity) of website product and service definitions. Available online payment modes. Task required for combined bookings with company used for last transaction or previous transactions. Time spent completing purchase.	Kaynama & Black (2000), Donthu (2001), Jeong & Lambert (2001), Madu & Madu (2002), Kim & Lee (2004), Kim et al. (2005), Park et al. (2007), Verhoef et al. (2007; purchase completion time), Jaiswal et al. (2010), Ganesh et al. (2010; ease of payment), Ali (2016; usability)
Information attributes Purchase instructions provided online. Information provided on company website … … about service characteristics. … about online range of tourism products/services.	Kaynama & Black (2000), Jeong & Lambert (2001), Madu & Madu (2002), Kim and Lee (2004), Kim et al. (2005), Park et al. (2007), Verhoef et al. (2007), Ganesh et al. (2010) (range of merchandise), Hung et al. (2014), Ali (2016; functionality)
Customer service Booking/cancellation-confirmation, discount and/or invoice notices. Availability of online customer service and/or complaints and claims system. Chosen online company's customer data privacy and security policy.	Kaynama & Black (2000), Madu & Madu (2002), Kim & Lee (2004), Kim et al. (2005; 2009; security), Park et al. (2007), Jaiswal et al. (2010; privacy, security), Ali (2016; security and privacy)
Visual appeal Chosen company's website appeal.	Kaynama & Black (2000), Kim et al. (2005; 2009), Bauer et al. (2006), Urban et al. (2009), Ganesh et al. (2010), García & Garrido (2013)
Satisfaction Overall satisfaction with last online purchase of tourism services. Online purchasing experience over time with company of last choice.	Arrondo et al. (2002), Berné et al. (2005), Kim et al. (2009), Finn et al. (2009; cumulative), Hung et al. (2014; cumulative), Betancourt et al. (2017; cumulative)
Loyalty Intention to continue using the same online tourism service. Recommendation of chosen online company.	Arrondo et al. (2002), Berné et al. (2005), Finn et al. (2009; repurchase), Chiu et al. (2014; repurchase), Betancourt et al. (2017; repurchase)
Perceived costs Prices of the service purchased online… … compared to prices available offline … compared to other, similar online services. Effort required for online versus offline purchase process.	Kim et al. (2011), García & Garrido (2013), Chiu et al. (2014; monetary savings), Verhoef et al. (2007; search and purchase effort)

Analysing Basic Statistics of the Variables

Analysis of the basic statistics for the full sample gives the means, maximums, and standard deviations shown in Table 2. The usual t-test is then used to see whether the mean value is statistically different from the central value of the scale (5).

All variables receive the maximum score (10 points) at least once. All mean values are higher than 7; that is, above the midpoint of the scale (5), except the one for the cancellation process, which has a mean rating of 6.92 but also the highest standard deviation (2.15). Thus, the respondents' online service ratings are remarkably positive, although improvement will be needed to make them outstanding. The highest score (8.15) is for ease-of-access, which also shows the lowest standard deviation (1.48), indicating the highest level of agreement among respondents.

The second highest rated website service is booking confirmation notices, which is followed by general purchase process instructions, time spent completing purchase, and privacy/security policies. Below are other indicators of website information quality: identification, definition, and service characteristics. These results suggest more effort having been made in these areas and signal the need for attention to others; mainly, cancellation and claim services, provision for "one-stop-shop" purchases, and simplification of the task required in combined bookings. Some online tourism companies (such as booking.com) are showing some awareness in this respect, by introducing a free online cancellation option.

In these terms, confidence still appears to play a key role in market relations, particularly in online environments, as noted by Urban et al. (2009). Further improvement is needed in areas such as combined booking options and easing the task of the customer; this would meet the demand for one-stop shops and easy purchase completion revealed by the ratings for the availability of multiple, varied options on a specific tourism website.

Table 2. Basic statistics

	Max.	Mean	Standard Deviation
Q1. Website accessibility.	10	8.15↑	1.59
Q2. Combined bookings option.	10	7.20↑	1.79
Q3. Perceived clarity of website product and service identification.	10	7.70↑	1.62
Q4. Perceived clarity (absence of ambiguity) of website product and service definitions.	10	7.40↑	1.74
Q5. Available online payment modes.	10	7.66↑	1.76
Q6. Task required for combined bookings.	10	7.20↑	1.69
Q7. Time spent completing purchase.	10	7.81↑	1.65
Q8. Purchase instructions provided online.	10	7.83↑	1.55
Q9. Information on chosen service provided on company website.	10	7.66↑	1.62
Q10. Range of tourism products-services offered.	10	7.57↑	1.70
Q11. Booking confirmation, discount and/or invoice notices.	10	8.12↑	1.64
Q12. Online cancellation notices.	10	6.92↑	2.15
Q13. Customer service and/or complaints and claims system available on website.	10	7.14↑	1.96
Q14. Chosen online company's customer data privacy and security policy.	10	7.80↑	1.67
Q15. Chosen company's appeal.	10	7.45↑	1.48
Q16. Overall satisfaction with last online purchase of tourism services.	10	7.85↑	1.69
Q17. Cumulative online purchasing experience with company of last choice.	10	7.89↑	1.64
Q18. Intention to continue using the same online tourism service.	10	7.86↑	1.72
Q19. Recommendation of chosen online company.	10	8.14↑	1.68
Q20. Prices of the service purchased online… …compared to prices available offline.	10	7.39↑	1.62
Q21. … compared to other, similar online services.	10	7.15↑	1.61
Q22. Effort required for online versus offline purchase process.	10	7.47↑	1.93

↑ Value statistically greater than the midpoint of the scale (95% confidence level).

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The mean rating for overall last-purchase satisfaction is 7.85, just below the 7.89 assigned to accumulated satisfaction. Similar ratings go to repurchase intention and intention to recommend the company (7.86 and 8.14, respectively).

With respect to transaction costs, online perceived prices are lower than offline (mean value 7.39). The chosen online option is rated more highly than other available online options (mean rating 7.15). Similarly, perceived effort required is lower for the online than the traditional environment (mean value 7.47).

Differences Across Different Types of Online Tourism Channels

Next, between-group differences are analysed through an ANOVA test.

Group 1 (20.4% of the total sample), is formed by indirect channel (search and meta-search engine) users (G1); group 2 (44.1% of total sample) by shorter indirect channel (OTA) users (G2); and group 3 (35.5% of total sample) by direct channel users (G3) (Table 3).

Overall, OTAs come top in the ratings (G2). The significant between-group differences concern the task required of one-stop shoppers, purchase instructions, tourism product/service range, online complaints and claims system, website appeal, and intention to recommend chosen online service. In all these features, the OTAs and direct channels (G2 and G3) have the edge on search engines (G1) and, in terms of information on product/service range, website appeal and claims, OTAs outperform the direct channel. OTAs, by presenting higher mean for variables such as combined-booking options, perceived clarity of website product and service identification task required for combined products and purchase instructions provided online, favour the participation of customers and their cooperation with operators thus stimulating value co-creation which in turn enhances customer satisfaction. Authors such as Franke & Schreier (2010), Franke et al. (2010), Moretta et al. (2018) demonstrate that value co-creation improve customer satisfaction.

These results are consistent with the higher-satisfaction- with-last-transaction and recommendation-intention ratings given to OTAs.

G1 shows the lowest values overall, even for product/service range, where search engines could be expected to have the edge on the direct channel, but the difference is not statistically significant. The direct channel, G3, attains higher mean ratings than search engines for ease-of-access, task required for one-stop shop, purchase completion time, and booking confirmation, discount and/or invoice notices.

Finally, a survey question on the perceived importance of the various website quality attributes as determinants in the decision to increase online tourism service purchases revealed that lower prices and shorter purchase paths are the strongest determinants in all three groups. The only between-group differences relate to online service range, which is more important to OTA customers than to the other two groups (F-value 3,732, sig. 0,025).

CONCLUSION AND REMARKS

Although hotel room distribution services are still dominated by traditional channels (Stangl et al., 2016), this work shows that direct and indirect online tourism distribution channels coexist as established options for digital tourists. Players in the online tourism industry face three main challenges: a highly

Table 3. Mean comparison between groups

	G1 Mean	G2 Mean	G3 Mean	F	Sig.	Diff.	
Q1. Website accessibility.	7.30	8.20	8.28	4.303	0.014	1-2; 1-3	
Q2. Combined booking options.	6.68	7.32	6.88	2.786	0.063		
Q3. Perceived clarity of website product and service identification.	7.29	7.79	7.46	2.065	0.128		
Q4. Preciseness (absence of ambiguity) of website product and service definition.	7.43	7.42	7.28	0.182	0.834		
Q5. Available online payment modes.	7.18	7.72	7.60	1.238	0.291		
Q6. Task required for combined products.	6.61	7.32	6.81	3.329	0.037	1-2; 1-3	
Q7. Time spent completing purchase.	7.00	7.86	7.94	3.741	0.025	1-2; 1-3	
Q8. Purchase instructions provided online.	7.14	7.91	7.75	3.262	0.039	1-2; 1-3	
Q9. The information provided on website … about characteristics of chosen tourism service.	7.25	7.71	7.60	1.087	0.338		
Q10. … about company's online range of tourism products/services.	7.32	7.71	7.03	4.618	0.010	2-3	
Q11. Booking confirmation, discount and/or invoice notices.	7.18	8.17	8.30	5.200	0.006	1-2; 1-3	
Q12. Online cancellation notices.	6.72	7.01	6.55	1.126	0.326		
Q13. Online customer service and/or complaints and claims system.	6.56	7.29	6.69	3.331	0.037	1-2; 2-3	
Q14. Online company's customer data privacy and security policy.	7.08	7.88	7.71	2.908	0.056		
Q15. Chosen company's website appeal.	7.04	7.57	7.07	4.293	0.014	1-2; 2-3	
Q16. Overall satisfaction with last online purchase of tourism services	7.1	7.95	7.70	3.576		1-2	
Q17. Cumulative online purchasing experience with company of last purchase occasion.	7.32	7.99	7.65	2.981			
Q18. Intention to continue using the same online tourism service.	7.41	7.90	7.83	1.035			
Q19. Recommendation of chosen online company.	7.50	8.24	7.96	3.041		1-2	
Q20. Price comparison with offline channels for service purchased.	6.93	7.49	7.12	2.620			
Q21. Price comparison with other, similar online services for service purchased.	6.89	7.21	6.95	1.075			
Q22. Effort required for online versus the offline purchasing process.	6.89	7.59	7.15	2.835			

* G1: Search and Meta-search engines, G2: OTAs; G3: Suppliers

competitive environment, technological evolution, and changes in consumer behaviour. With respect to the last, increasing consumer proactivity and participation in production and distribution processes have been identified among the key influences on online tourism companies' strategies and operations. A deep understanding of online tourism purchase behaviour is therefore essential to success. Thus, this work has analysed the steps in the value chain, taking into account the supply-demand interaction and illustrating the theoretical background with an analysis based on a survey of the Spanish online tourism service industry. With respect to the three research questions formulated at the beginning of this paper, the current scenario of the online tourism sector appears more indicative of re-intermediation than of

disintermediation. In this sense, consumers' overall ratings for online tourism services, while remarkably positive, indicate the need for some improvement. Considering the sum of efforts of the two indirect channels analysed, this statement is reinforced.

In the online tourism distribution system, search engines come lowest in the ranking, failing to score higher than either of the other groups in any of the analysed variables. These results are in line with Murphy et al. (2016), and consistent with the recent incorporation of these intermediaries to the online distribution system. Most noticeable is the result for time spent completing purchase. A priori, search engines can be said to focus on beating rival channels through cheapness and speed, by aggregating the information and simplifying browsing. This is not how the respondents see it, however. Thus, failure to convince consumers and unsatisfactory claims management might be identified as the main weaknesses of the search engine channel.

Top in the ranking, meanwhile, as already noted, is the online retail tourism channel. The economic advantages of OTAs, summarized by Stangl et al. (2016), are based mainly on greater volume, data mining knowledge and the application of different business models, are complemented by the strengths assigned to them by their customers.

Thus, the survey respondents consider the strengths of these retailers to lie in hedonic (website appeal) and some utilitarian website-quality attributes relating the facility of co-production with the customer, through general information provision, product/service variety, and purchase and post-purchase services.

These results are consistent with the literature. Currently, OTAs offer the digital tourist a superior product, and have developed the necessary skills to connect with customers. They also succeed in leaving customers more satisfied and willing to give positive recommendations. Previous studies, such as Jeong and Lambert (2001), have reported that retailers' greater capacity to satisfy customers and influence repurchase intentions increases their customer attraction and retention potential.

The strengths of the direct channel (suppliers), meanwhile, lie in website accessibility, convenience (time costs), booking procedures, and price promotions. However, although these are advantages with respect to search engines, the differences with respect to OTAs are not significant. Thus, OTAs emerge at the top of the ranking, but nonetheless need to maintain their position by identifying further opportunities for differentiation and proving their know-how to customers.

What, then, does the future hold? While OTAs appear to be in the lead, the game is not yet over. As Law et al. (2015) point out only effective use of technologies and a wise choice of e-business strategy will keep companies competitive. The greatest challenges lie in the e-tourism domain, where competition is being driven by constantly-evolving technology and the changing behaviour of digital tourists. Here, therefore, the future depends on the ability to adapt quickly and effectively, and keep ahead of changes in technology, consumer demand and competition. In this sense, prices and purchase completion time are the main consumer drivers for online tourism services, but service variety is the only attribute showing significant between-group differences. Once again, the ratings of the OTA customers are higher than those of the other two groups, which confirms the perceived differentiation of OTAs from the retail channel. There may still be a need for clearer definition of differentiation targets, although differentiation between companies on the same channel level may be a hard goal to achieve.

Regarding management implications, OTAs must learn to take advantage of their potential as providers of a more complete range of products/services, but all agents need to seek their own opportunities for sustainable competitive advantage. Each channel has to find its own way and future opportunities do not appear obvious. This could be the reason for the continuous economic shifts observed in online tourism, including acquisitions, mergers, and alliances between agents at different channel levels. The

latest news from PhoCusWright (2018) is that large online travel companies are putting technology and connectivity at the forefront of their strategy. Over time, alignments and consolidation will emerge, but, for now, online sellers all need each other. The expansion strategies being adopted by emerging online tourism channels, such as social networks, Destination Marketing Organisations, and mobile technologies are in development, but so far play a minor role in terms of bookings (Stangl et al., 2016).

That said, although providing an outstanding online consumption experience can be difficult in this sector, the observed trend pattern and current situation provide some insights. One is that, for proper understanding and management of situational particularities, online service distribution analysis and target-market perspectives need to be considered above economic and financial resource issues. Another is that treating online distribution channels as components of a networked interface rather than as independent units, as Beritelli and Schegg (2016) suggested, might be the most promising premise from which to approach the analysis of existing and potential firm-customer relationships and effective decision making.

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KEY TERMS AND DEFINITIONS

Customer Satisfaction: Customer judgment or evaluation of the service offered comparing expectations. It is one of key marketing objectives of all market-oriented company. It involves customer experience with the service (purchase interaction).

Digital Tourist: A consumer who purchases tourism services through online distribution channels.

OTAs: Online travel agencies. They are intermediaries in electronic tourism channels. They can be wholesalers and retailers. As a retailer, the OTA is the electronic seller of tourism services to the consumer.

Repurchase Intention: Customer statement about the intention to purchase again to the same seller.

Strength: Business competitive advantage.

Value Chain: According to customer-oriented strategy, it is a process building value from the early stages of service production (perceived quality) to the attainment of customer satisfaction and, ultimately, customer loyalty.

Website Perceived Quality: Consumer assessment about the level of service quality offered by a company through its web page, previous to the online purchase decision.

Chapter 11
Conceptualization and Measurement of Smart Shopping

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ABSTRACT

The purpose of this chapter is to critically review current studies on "smart shopping" with the aim of improving the understanding of this phenomenon and suggesting future lines of research. The authors present a pioneering classification of international research on smart shopping published in the last 30 years that provides a comprehensive overview of existing knowledge. They categorize smart shoppers' traits and develop a thorough analysis of existing measurement scales, data collection methods, product categories and countries that have been objects of prior studies. Their findings highlight the need to develop cross-cultural models that consider the affective and behavioral dimensions of smart shoppers from different countries to help academics and practitioners better identify and target this customer segment.

INTRODUCTION

Deal hunting has become an integral part of daily life for millions of consumers who seek lower costs but are also interested in maximizing the benefits associated with the shopping experience (Atkins, Kumar, & Kim, 2016). The term "smart shopper" describes consumers who invest considerable effort in searching and utilizing promotion-related information to make the best possible purchase (Mano & Elliott, 1997). Unlike price-conscious consumers who focus exclusively on paying low prices (Lichtenstein, Ridgway, & Netemeyer, 1993), smart shoppers seek price and time savings, as well as self-expression benefits (Atkins

& Kim, 2012; Bicen & Madhavaram, 2013; Chandon, Wansink, & Laurent, 2000; Schindler, 1998). For these shoppers, getting a good deal is a source of ego-related positive emotions, such as a sense of pride and accomplishment (Schindler, 1998). Thus, smart shoppers capitalize on the advantageous purchase opportunities available to them in the marketplace and take pride in their decision-making capabilities (Burton, Lichtenstein, Netemeyer, & Garretson, 1998).

This customer segment has attracted the interest of marketing practitioners because the self-perceptions of smart shoppers have been found to influence brand attitude (Garretson et al., 2002; Liu & Wang, 2008; Manzur, Olavarrieta, Hidalgo, Farías, & Uribe, 2011), willingness to buy (Chung & Darke, 2006), promotion proneness (Chandon et al., 2000; Labbé-Pinlon, Lombart, & Louis, 2011) and word-of-mouth communication (Bicen & Madhavaram, 2013; Chung & Darke, 2006).

Although the term smart shopping can be frequently observed on television, in magazines, and on the Internet (Atkins & Hyun, 2016), research related to this topic is rather scarce. The authors of this chapter have performed an extensive review of international academic literature on marketing and psychology with the dual aim of critically reviewing all previous references relevant to smart shopping and improving current understanding of this phenomenon.

To address these objectives, this chapter begins with a discussion of the methodology used to undertake the literature review. The second section analyses the existing definitions of the smart shopping concept. The following section develops the first categorization of previous studies on this topic. Then, a thorough analysis of existing measurement scales is detailed. The conclusion section presents the contributions and limitations of the study and suggests further research lines.

Methodology

To critically review all previous references related to smart shopping, this study performed a broad search of all academic literature on this topic published in the last 30 years by examining online databases as well as reference lists of articles. The search was undertaken directly on the Science Direct, JStor, Emerald, Wiley, Sage, Routledge, and Prentice-Hall websites as well as in other relevant catalogues. The relevant articles were identified using the following specific key words: "smart shopper", "smart shopping", "deal-prone consumers", "smart buy", "smart purchase", "deal hunt", "smart shopper feeling", "smart shopper self-perception" and "consumer internal reward". For a taxonomy of the articles, a database in Microsoft Excel was developed to facilitate further analysis. After careful consideration and selection, core articles to be included in this review were shortlisted based on the empirical nature of the publications. The final sample included 17 empirical articles that were analysed for their content and categorised according to two criteria: (1) whether or not smart shoppers are the focus of the study and (2) the key object of analysis (smart-shopper feelings or smart shopper-attributed behaviour). Section 3 describes the resulting categorization.

CONCEPTUALIZATION OF SMART SHOPPING

"Smart shopping" is generally associated with the purchase process followed by smart shoppers (Labbé-Pinlon et al., 2011), but it is rarely defined in an explicit manner. In an exception, Mano and Elliott (1997) describe smart shopping as "a tendency for consumers to invest considerable time and effort in seeking and utilizing promotion-related information to achieve price savings" (p. 504). According to

these authors, the effective use of the individual's buying skills that lead to enhanced economic utility is associated with three interrelated components: (1) the shopper's marketplace knowledge, (2) individual behaviours designed to obtain promotion-related information, and (3) the consequences experienced by consumers who take advantage of price promotions.

A certain controversy exists in the academic literature regarding the source of the internal reward smart shoppers derive from a purchase. A large number of studies suggest that smart shopper's intrinsic reward is almost exclusively motivated by price discounts (Chandon et al., 2000; de Pechpeyrou, 2013; Labbé-Pinlon et al., 2011; Mano & Elliott, 1997; Schindler, 1998). Baltas (1997) suggests that perceived quality is also important because the promise of good quality at a reasonable price leads to a "smart buy"-associated feeling that may motivate certain individuals. However, smart shoppers are not only focused on the economic benefits provided by a shopping trip (Atkins & Kim, 2012). They also seek a hedonic reward (Babin, Griffin, & Darden, 1994, p. 646). According to Garretson, Fisher, and Burton (2002, p. 97), "smart shoppers are interested in saving money, of course, but how they go about saving this money is also important to them". Atkins and Kim (2012, p. 361) extend the scope of smart shopping and propose that "the definition of smart shopping includes consumers seeking to minimize the expenditure of time, money, or energy to gain hedonic and utilitarian value from the [shopping] experience".

Schindler (1989, p. 448) is a pioneer in providing preliminary evidence of smart-shopper feelings. He defines smart-shopper feelings as "the ego-related affect which may be generated in a consumer by a price. It includes feelings ranging from pride to anger, to the satisfaction of helping others". Garretson et al. (2002, p. 94) build on Schindler's concept and define smart-shopper self-perception as a psychological construct "pertaining to consumers' need for an intrinsic reward from price savings", which represents benefits such as "a sense of accomplishment, a boost in self-esteem and pride in shopping savoir faire".

To identify and target smart shoppers, it is important to understand the traits that define their purchasing behaviour as well as the affective benefits they obtain when they perceive they have found a good deal. Table 1 shows the descriptions of smart shoppers' traits that have been identified in previous studies. The first set of characteristics concerns shoppers' affective responses, while the second group includes the behavioural traits attributed to smart shoppers.

CATEGORIZATION OF EMPIRICAL STUDIES ON SMART SHOPPING

Table 2 presents a classification of the research that has been conducted to date concerning smart shopping. Studies are classified according to two criteria: (1) whether or not smart shoppers are the focus of the study and (2) the key object of analysis (smart-shopper feelings or smart shopper-attributed behaviour). The articles were analysed for their content, research objective, data collection methodology, sample, product category and country.

For most relevant studies, the main research goal is to understand how smart shoppers feel or behave. No academic research that simultaneously measures the emotional and behavioural components of smart shopping has been identified.

The main objective of a second group of studies is to analyse phenomena other than smart shopping. In these cases, researchers consider smart-shopper feeling as a variable that may influence the pattern of the relationships that are actually the key object of the research. In four of these articles, the research focuses on factors that determine consumers' attitudes towards store brands.

Table 1. Selected traits of smart shoppers

Affective Traits (Feeling/Emotions)	Authors
They experience a pride-like feeling derived from the noneconomic appeal of a discount.	Schindler (1989, 1998); Burton et al. (1998); Chandon et al. (2000); Garretson et al. (2002); Manzur et al. (2011).
They perceive themselves as efficient, effective, smart and responsible for obtaining a discount.	Schindler (1989, 1998); Bicen and Madhavaram (2013)
They perceive themselves as responsible for obtaining a discount and consequently, have a tendency to feel happier and more self-confident.	Bicen and Madhavaram (2013).
They feel a sense of accomplishment, a boost in self-esteem, and pride in their perceived shopping "savoir faire."	Garretson et al. (2002).
They experience an ego-related, internal reward derived from the utilitarian and hedonic benefits generated by price savings.	Schindler (1989); Mano and Elliott (1997); Atkins and Kim (2012).
They seek the impression of being "with it" and "looking good".	Chung and Darke (2006).
Behavioural Traits	**Authors**
They effectively seek and attain price savings. They find top quality products at discounted prices. They monitor out-of-store and in-store promotional information. They are more likely to pay attention to sales promotions in the media. They engage in-store browsing. During in-store purchasing, they tend to exhibit price monitoring behaviours such as searching for store coupons or asking store personnel for information and engage in in-store price negotiation. They are able to undertake price evaluations that depend on memory search, complex mental computations and/or physical search activities.	Mano and Elliott (1997)
They compare products online and browse sales advertisements.	Atkins and Hyun (2016).
They pay more attention to price promotions (immediate price discounts, batch promotions, and coupons) than to product promotions (gifts, samples, games and lotteries).	Labbé-Pinlon et al. (2011).
They delay the purchase until it is at a price they want to pay.	Mano and Elliott (1997); Atkins and Hyun (2016).
They are not very prone to impulsive buying. They make shopping lists, and they make rational brand choices.	Mano and Elliott (1997); Burton et al. (1998); Atkins and Kim (2012).
They get what they expect from their purchases. They purchase what they are looking for and it fits their needs. They purchase good quality products.	Atkins and Kim (2012); Atkins and Hyun (2016)
They efficiently use resources to obtain economic benefits while finding pleasure in the activity.	Mano and Elliott (1997); Odou et al. (2007); Labbé-Pinlon et al. (2011).
They seek to minimize their expenditure of time, money, or energy to gain hedonic and utilitarian value from the shopping experience.	Atkins and Kim (2012); Atkins and Hyun (2016).
They have a high likelihood of repeat purchase and word-of-mouth communication.	Schindler (1998); Chung and Darke (2006); Bicen and Madhavaram (2013).

Regarding the procedures used in previous research to collect empirical information on smart shopping, as the fourth column of Table 2 illustrates, researchers have a substantial preference for structured techniques, particularly surveys and experiments combined with a survey. Only Odou, Souad, and Belvaux (2007) use an unstructured method (in-depth interviewing). All studies with a primary focus on

Table 2. Empirical studies on smart shopping: objectives and methodology

	Authors	Study's Main Objective	Methodology	Sample Size	Sample Type	Category	Country
Smart-shopper feeling as the *main* objective of the study	Bicen and Madhavaram (2013)	To test the affective consequence of price discounts mediating the relationship between all causal dimensions of attributions and behavioural consequences.	Experiment between-subject design 2x2x2 + survey	183	Students	Digital cameras	US
	De Pechpeyrou (2013)	To test the relationship between promotional pricing schemes and smart shopper feelings, evaluations of a good deal and locus of causality.	Experiment 4 promotional scenarios + survey	156	Shoppers	Cookies, crisps and cereal bars	France
	Schindler (1998)	To understand the nature and implications of the noneconomic components of price promotions' affective consequences.	Experiment between-subject design 2x2x3 + survey	202	Female shoppers	Fast food, dresses, TVs	US
Smart shopper feeling as the *secondary* objective of the study	Manzur et al. (2011)	To determine whether attitudes toward national brand promotions and store brands have similar or different conceptual antecedents.	Store intercept survey	300	Female shoppers	Groceries	Chile
	Liu and Wang (2008)	To examine whether promoted brands and private labels attract different or similar consumers through psychographics.	Survey	328	Students	Groceries	Taiwan
	Chung and Darke (2006)	To study the relation between self-relevance and word-of-mouth (WOM) considering cultural differences.	Experiment between-subject design 2 x 2 x 2 + survey	136	Students	Self-relevance and utilitarian products	Canada and Singapore
	Darke and Dahl (2003)	To provide evidence of how discounts increase purchase satisfaction due to non-financial rewards.	Experiment between-subject design 3 x 2 + survey	101	Students	Movie videos	US
	Garretson et al. (2002)	To understand more about why price-oriented consumers have different attitudes toward private labels and national brand promotions.	Store intercept survey + sales receipt	300	Shoppers	Groceries	US
	Chandon et al. (2000)	To provide an integrative framework of the consumer benefit of sales promotions.	Experiment between-subject design 2 x 5 + survey	350	Shoppers	Utilitarian and hedonic products	France and US
	Groeppel-Klein et al. (1999)	To understand whether different shopping motives influence the expectations about a store and whether these shopping motives affect consumers' in-store behaviour.	Store intercept survey (pre and post purchase)	141	Shoppers	Furniture	Austria
	Burton et al. (1998)	To develop a consumers' attitude scale toward private label brands.	Survey	333	Shoppers	Groceries	US
	Atkins and Hyun (2016)	To assess the effects of gender, product type, and generation on the three smart shopping purchase factors.	Survey	1474	Shoppers	Clothing, groceries, electronics	US
Smart-shopper behaviour as the *main* objective of the study	Atkins et al. (2016)	To segment smart grocery shoppers.	Survey	751	Shoppers	Groceries	US
	Atkins and Kim (2012)	To investigate consumers' perceptions of the term smart shopping; develop and validate a measure of smart shopping.	Survey	1438	Shoppers	Clothing, groceries, electronics	US
	Labbé-Pinlon et al. (2011)	To identify smart shoppers' reactions to price reductions.	Experiment between-subject design 3 x 2 + survey	351	Students	Cereals, non-alcoholic drinks, shampoo	France
	Odou et al. (2007)	To explore the behaviour of a particular segment of smart shoppers: payback-offer users.	Qualitative in-depth interviewing	17	Shoppers	Not mentioned	France
	Mano and Elliott (1997)	To develop a measure of smart shopping.	Survey	228	Students	Not mentioned	US

smart-shopping feelings use experiments in which the consumers are faced with a fictitious purchase situation to analyse their emotions when different choices are made. However, research on behavioural traits attributed to smart shoppers employs surveys, in-depth interviews or experiments.

Over one-third of these studies rely only on exploratory fieldwork developed with students. Moreover, with the exception of Atkins and Hyun (2016), Atkins et al. (2016) and Atkins and Kim (2012), researchers who collect data using surveys use small sample sizes ranging from 140 to 350 individuals. Both of these issues could make generalizing the results of these studies difficult.

Additionally, most previous studies involving smart shopping are based on data from a single country. Only Chung and Darke (2006) and Chandon et al. (2000) present partial comparisons between pairs of countries. However, smart shoppers were not the primary research objective for either of these studies.

Geographically, the largest number of studies were carried out in the United States. Chile and Canada complete the list of American countries where the topic of smart shopping have been researched. In Asia, studies on the topic have been conducted in Singapore and Taiwan. In all cases, the main focus was consumer behaviour-related phenomena that may be influenced by smart shopping.

To date, the only European nation in which smart shopping has been analysed in depth is France; in particular, the small sample size in research by Groeppel-Klein et al. (1999) in Austria poses difficulties with respect to extrapolating results.

Regarding the broad categories that have been analysed, only four studies have examined smart shopping for fast-moving consumer goods. Most studies have focused on groceries. Clothing and consumer electronics were the most frequently studied durable products.

MEASUREMENT AND SCALES

Table 3 provides details on the measurement scales used for smart shopping and smart shoppers' feelings or self-perceptions. Tables 4 and 5 in the appendix present details on the numerous items employed to measure different aspects of smart shopping used in prior studies.

Regardless of perspective (behavioural or affective), with the exception of the studies developed by Atkins and colleagues (Atkins & Hyun, 2016; Atkins & Kim, 2012; Atkins et al., 2016), all other investigations propose one single dimension for the analysed concept. Moreover, the Likert-type scales used to measure different dimensions of smart shopping are varied and have different origins and diverse compositions. Tables 4 and 5 of the appendix show the final items of the scales developed to date and their standardized factor loadings.

For studies focusing on smart-shopping feeling, only three scales were originally developed by the authors (Burton et al., 1998; Chandon et al., 2000; Schindler, 1998). The remainders were either based on these scales or obtained from other references. Schindler (1998) developed the first scale, which is an 8-item Likert-type scale used to measure the different positive emotions derived from obtaining a price discount. His findings show that, keeping the size of the discount constant, the consumer's perception of responsibility for obtaining a price reduction increases smart-shopping feelings. Studies on store brands (Garretson et al., 2002; Liu & Wang, 2008; Manzur et al., 2011) adapt versions of the 4-item smart shopper self-perception scale initially proposed and tested by Burton et al. (1998). Chandon et al. (2000) generate a different 3-item scale called the "value expression benefit scale". Later, de Pechpeyrou

Table 3. Measurement and scales

	Author	Scale	Dimensions/Items	Reliability	Convergent and Discriminant Validity Tested
Smart-shopping feeling as the main objective of the study	Bicen and Madhavaram (2013)	Indirect scale, measured through *happiness scale* from Honea and Dahl (2005).	2 item Likert-type scale. Single dimension.	Alpha values ranging from 0,70 to 0,98	Yes
	De Pechpeyrou (2013)	Smart shopping feeling scale adapted from Chandon *et al.* (2000).	3 item Likert-type scale. Single dimension.	Validated	Yes
	Schindler (1998)	Non-direct scale, measured through a *price satisfaction scale*.	8 item Likert-type scale. Single dimension.	Alpha = 0,92	Not mentioned
Smart shopping feeling as the secondary objective of the study	Manzur et al. (2011)	Smart shopper self-perception scale adapted from Garretson *et al.* (2002).	2 item Likert-type scale. Single dimension.	Alpha = 0,91	Yes
	Liu and Wang (2008)	Smart shopper self-perception scale adapted from Burton *et al.* (1998).	3 item Likert-type scale. Single dimension.	Alpha = 0,84	Yes
	Chung and Darke (2006)	Smart shopping motives.	2 item Likert-type scale. Single dimension.	Not mentioned	Not mentioned
	Darke and Dahl (2003)	Indirect scale; through the effect of purchase attributions on satisfaction.	6-point Likert-type scale. Single dimension.	Not mentioned	Not mentioned
	Garretson et al. (2002)	Smart shopper self-perception scale from Burton *et al.* (1998).	2 item Likert-type scale. Single dimension.	Alpha = 0,94	Yes
	Chandon et al. (2000)	*Value expression benefit scale* from Chandon et al. (2000).	3 item Likert-type scale. Single dimension.	Validated	Yes
	Groeppel-Klein et al. (1999)	Indirect scale; through *price interest*.	3 item Likert-type scale. Single dimension.	Tested through non-significant differences in day and time	Discriminant analyses for cluster solution
	Burton et al. (1998)	Smart shopper self-perception scale developed by the authors.	4 item Likert-type scale. Single dimension.	Alpha = 0,94	Not mentioned
Smart-shopping behaviour as the main objective of the study	Atkins and Hyun (2016)	Smart shopping scale developed by the authors.	21 item Likert-type scale. 5 dimensions.	Alpha > 0,70	Yes
	Atkins et al. (2016)	Smart shopping scale developed by the authors.	34 item Likert-type scale. 5 dimensions.	Alpha > 0,75	Yes
	Atkins and Kim (2012)	Smart shopping scale developed by the authors.	15 item Likert-type scale. 3 dimensions.	Alpha > 0,70	Yes
	Labbé-Pinlon et al. (2011)	Smart shopping behaviour scale from Lombart and Belvaux (2004).	3 item Likert-type scale. Single dimension.	Lombart and Belvaux (2004)	Lombart and Belvaux (2004)
	Odou et al. (2007)	Qualitative	Qualitative	Qualitative	Qualitative
	Mano and Elliott (1997)	Smart shopping scale developed by the authors.	7 item Likert-type scale. Single dimension.	Alpha = 0,91	Yes

(2013) also use this scale. When examining the semantics of their indicators, both scales appear to be very similar. They both allude to the intrinsic reward experienced by the individual after making a good (smart) purchase: a feeling of pride, increased self-esteem and a sense of having acted smartly.

From a behavioural perspective, two empirical studies propose and validate a single-dimension phenomenon (Labbé-Pinlon et al., 2011; Mano & Elliott, 1997). These authors exclusively focus on the shopper's efforts that lead to obtaining price discounts. More recently, Atkins and Kim (2012) develop a more complex scale of smart shopping comprising three dimensions: the right purchase, economic savings and the time/effort savings. In a later study, Atkins and Hyun (2016) measure grocery, clothing

and electronics smart shopping in terms of five constructs in two stages: the pre-purchase stage includes the constructs "information search" and "planning", while the purchase stage includes the constructs "saving effort and time", "the right product", "saving money".

Based on the last column of Table 4 in the appendix (standardized factor loadings), it can be concluded that prior research on smart-shopping feeling has not produced enough information to perform a meta-analysis since only two studies use standardized coefficients for items.

The information on smart-shopping behaviour is more accurate. Mano and Elliott (1997) show all the factor scores of their unidimensional model, which range from 0.61 (At times, I browse just to get information for future purchases) to 0.77 (I keep abreast of when stores have sales). The studies by Atkins and Kim (2012) and Atkins and Hyun (2016) also present complete information for all the dimensions and items of their smart shopping scales. The items used by Mano and Elliott (1997) and Atkins and colleagues are not comparable. However, the smart shopping scales used by Atkins and Kim (2012) and Atkins and Hyun (2016) share a large number of items, which allows for a comparison of the standardized factor loadings for the three dimensions of groceries smart shopping: time/effort savings, the right purchase and money savings (Table 5 of the appendix).

In Atkins and Kim (2012), the factor scores range from 0.72 to 0.91, and they range from 0.64 to 0.86 in Atkins and Hyun (2016). When comparing both scales at the item level, the six items of the dimension time/effort savings show differences in the loading scores, which range from 0.05 to 0.11 unit points. For the five measurement items of the right purchase, the range varies from 0.05 to 0.08 unit points, while for the four items of money savings, the difference between the factor loadings of both scales fluctuates from 0.05 to 0.10 unit points. When comparing the mean values of the factor scores of the two scales at the item level, the results range from 0.69 to 0.83 for the measurement items of time/effort savings. For the right purchase dimension, the mean values for each of the five items range from 0.69 to 0.86. Finally, the mean value of the factor loadings for each of the four items related to the dimension money savings is concentrated between 0.77 and 0.89. These estimations increase the external validity of the smart shopping scales developed by Atkins and colleagues.

CONCLUSION

This paper has comprehensively reviewed the existing academic international literature on smart shopping. The first conclusion is that a definition of the term is frequently avoided. The terms "smart shopper" and "smart shopping" tend to be used without an explicit description. This work categorizes the traits of smart shoppers that have been identified in previous studies, clearly distinguishing between characteristics related to shoppers' affective responses and smart shoppers' behavioural traits.

The salient finding among those developed from the analysis of existing scales is that to date, no study has developed and verified a model that simultaneously measures the emotional and behavioural components of smart shopping. Previous studies have focused on either smart shoppers' feelings or their behaviour. Therefore, smart shoppers have not been studied in a holistic manner. After the systematic review presented in this study, a more complete definition of smart shopping should include the tendency

to experience positive ego-related benefits from the purchase of products with the best quality-price relationship that results from the shopper's capability to seek and utilize commercial information.

This study classifies the preceding studies by the two main perspectives identified (feelings or behaviours) and the role of smart shopping as a research aim (main or secondary objective). This pioneering typology also provides information on the data collection methods most frequently used in this research area. It also identifies the product categories and countries that have been used as the object of research to date, revealing the lack of cross-cultural studies on smart shopping

The practical contribution of this study is an improved understanding of smart shoppers' affective and behavioural traits, which can be exploited by managers. Managers who seek to attract this particular customer segment could design promotions and commercial messages that encourage shoppers to believe they are obtaining the best possible deal as a result of their evaluative efforts.

A study of this nature certainly has limitations. Sources other than academic journals and main conferences proceedings are excluded from our search. Non-academic journals, industry studies and managerial reports could provide additional information for exploring this research topic. Moreover, only English and French publications are considered. Studies written in other languages may add a different viewpoint to this study. In addition, conducting a literature review using selected keywords inevitably means that some papers using different terminologies may have been missed.

Regardless of these limitations, further research can broaden the scope of studies on this topic. Based on the information presented in the previous sections, a number of main research gaps and future developments are identified.

First, one-third of the former empirical studies employed student samples. Although conclusive research is a costly and time-consuming affair, it is very difficult to construct a valid and reliable instrument for measuring smart shopping without the input of real shoppers (Kumar & Nayak, 2014).

Second, although scales for smart-shopping behaviour and smart-shopping feelings have been developed in previous studies, no previous academic research has developed a scale that jointly measures smart-shopper feelings and smart shopper-attributed behaviour. Thus, there is a need to develop a scale that measures smart shopping in a comprehensive manner. Further empirical models should also address whether smart shopping-associated behaviour is a unidimensional or multidimensional construct.

Finally, the critical assessment of prior research reveals the absence of cross-cultural studies related to smart shopping. The lack of studies that compare smart shoppers' affective and behavioural traits in different countries highlights the need for research that develops cross-cultural models. In addition, empirical data should be collected from different countries for a comparison. Cross-cultural studies would be particularly welcome by both the academic community and management practitioners.

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KEY TERMS AND DEFINITIONS

Brand Attitude: Predisposition to respond favorably or unfavorably towards a brand based on the shopper's beliefs regarding product performance relative to key evaluative criteria.

Cross-Cultural Model: Theoretical proposal to study consumer behavior, including its variability and invariance, under diverse cultural conditions.

Hedonic Value: Experiential and affective benefit.

Self-Expression Benefit: Gratification earned by enhancing affiliation and achieving social recognition.

Smart Shopping: Tendency to experience positive ego-related benefits from the purchase of products with the best quality-price relationship that results from the shopper's capability to seek and utilize commercial information.

Smart-Shopper Feeling: Positive internal reward generated when shoppers perceive that they have made a good purchase or obtained a bargain.

Store Brands: Brands owned and managed by retailers; such brands are also known as private labels and retail brands.

Utilitarian Value: Instrumental, functional benefit.

APPENDIX

Table 4. Smart-shopping feeling scales: final items

Authors	Construct	Items Concerning Smart Shopping FEELING	Standardized Factor Loadings
De Pechpeyrou (2013)	Smart shopper feeling	I can be proud of my purchase	Not available
		I feel like I am a smart shopper	
		I feel good about myself	
Bicen and Madhavaram (2013)	Happiness	This price reduction made me happy	0.98
		This price reduction made me pleased	0.98
Manzur et al. (2011)	Smart shopper self-perception	When I go shopping, I take a lot of pride in making smart purchases	Not available
		When I shop smartly, I feel like a winner	
Liu and Wang (2008)	Smart shopper self-perception	When I shop smartly, I feel like a winner	Not available
		When I go shopping, I take pride in making smart purchases	
		I get a real sense of joy when I make wise purchases	
Chung and Darke (2006)	Smart shopper motives	When talking with peers thinking of buying the same product, my WOM conveys the impression that I am "with it"	Not available
		When talking with peers thinking of buying the same product, my WOM "makes me look good"	
Darke and Dahl (2003)	Purchase attributions	Which of the following factors were involved in the purchase: skill, ability, luck, chance, effort, hard work, or difficulty in deciding what to purchase (the first two are associated with smart shopping)	Not available
Garretson et al. (2002)	Smart shopper self-perception	When I go shopping, I take a lot of pride in making smart purchases	Between 0.58 and 0.95
		When I shop smartly, I feel like a winner	
Chandon et al. (2000)	Value expression	I can be proud of my purchase	0.69
		I feel like I am a smart shopper	0.76
		I feel good about myself	0.76
Burton et al. (1998)	Smart shopper self-perception	When I shop smartly, I feel like a winner	Not available
		When I go shopping, I take pride in making smart purchases	
		Making smart purchases makes me feel good about myself	
		I get a real sense of joy when I make wise purchases	
Schindler (1998)	Price satisfaction	The price I paid for this item made me feel ecstatic	Not available
		The price I paid for this item made me feel excited	
		The price I paid for this item made me feel very special	
		The price I paid for this item made my day	
		The price I paid for this item made me feel thrilled	
		The price I paid for this item made me feel proud	
		The price I paid for this item made me feel powerful	
		The price I paid for this item made me feel like laughing	

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Table 5. Smart-shopping behaviour scales: final items

Authors	Construct	Dimensions	Items Concerning Smart Shopping BEHAVIOUR	Standardized Factor Loadings
Atkins and Hyun (2016)	Smart shopping	Information search	I conducted research prior to making this purchase	0.75
			I compared products online	0.49
			I prepared for this purchase by looking through sale advertisements	0.74
		Planning for purchase	Before making this purchase, I waited until I found the right product	0.65
			I delayed my purchase until it was at a price I wanted to pay	0.76
			I waited a while until this product went on sale	0.84
		Time saving	Making this purchase was convenient for me	0.78
			Making this purchase was not a hassle	0.80
			I did not spend extra effort on this purchase	0.64
			In making this purchase, I used my time wisely	0.77
			I didn't waste time in making this purchase	0.66
			I was able to make this purchase quickly	0.73
		Right purchase	This purchase was exactly what I was looking for	0.65
			This purchase perfectly fit my needs	0.75
			I got everything I expected from this purchase	0.77
			I got a good quality product from this purchase	0.80
			This purchase was a very good fit for me	0.82
		Money savings	I got what I wanted at a price I was willing to pay	0.75
			I got a lower price on this purchase than normal	0.72
			I got a reasonable price on this purchase	0.81
			I got a good deal on this purchase	0.86
Atkins and Kim (2012)	Smart shopping	Time/Effort savings	Making this purchase was convenient for me	0.85
			Making this purchase was not a hassle	0.85
			I did not spend extra effort on this purchase	0.74
			In making this purchase, I used my time wisely	0.82
			I didn't waste time making this purchase	0.77
			I was able to make this purchase quickly	0.80
		Right purchase	The purchase was exactly what I was looking for	0.72
			This purchase perfectly fit my needs	0.83
			I have gotten everything I expected from this purchase	0.85
			I got a good quality product from this purchase	0.85
			This purchase was a very good fit for me	0.89
		Money savings	I got what I wanted at a price I was willing to pay	0.85
			I got a lower price on this purchase than normal	0.81
			I got a reasonable price on this purchase	0.90
			I got a good deal on this purchase	0.91

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Table 5. Continued

Authors	Construct	Dimensions	Items Concerning Smart Shopping BEHAVIOUR	Standardized Factor Loadings
Labbé-Pinlon et al. (2012)	Money-saving-oriented		I like to abandon myself to the game of finding product(s) at the best price	Not available
			I go to this shelf to find bargains	
			I go to this shelf to benefit from promotions	
Mano and Elliot (1997)	Smart shopping		I keep abreast of when stores have sales	0.77
			I generally wait until an item is on sale before purchasing it	0.73
			I like to gather as much information as possible before going on shopping trips	0.70
			I shop a lot for specials	0.69
			I often find top quality merchandise at reduced prices	0.67
			I spend a considerable amount of time and effort preparing for shopping trips	0.64
			At times, I browse just to get information for future purchases	0.61

Chapter 12

How Smartness Enables Value Co–Creation:
An Explorative Study of Italian Fashion Retail

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ABSTRACT

Digital revolution has involved and changed many service industries and also retailing, renewing its inbound and outbound processes. The pervasiveness of the internet of things has boosted the rise and growth of digital platforms, exploiting consumers' potential in personalizing their shopping experience, according to their wants and needs. Digital platforms have triggered the transition from a traditional two-sided marketplace towards a dynamic and complex one. The smart mindset, which has pervaded retail service domain, is in line with the current service research, according to which the dematerialization of value exchanges implies a new approach to the traditional service delivery. Therefore, this chapter aims at investigating the way retailers manage digital tools. Embracing the framework of S-D logic, the analysis shapes the role that the digital technologies have in digital process reconfiguration as well as in the shaping of specific context or platform able to boost the emergence of retail service innovation. A multiple case study has been performed.

INTRODUCTION

The digital revolution has involved many service industries and among others retailing, renewing its traditional inbound and outbound processes (Pantano and Viassone, 2014). Due to their potential, digital solutions can be shaped the connection of people, process, data and things, being able to exploit the creation of value both for consumers and retailers (Pantano and Timmermans, 2014) and to trigger the transition from a traditional two-sided marketplace towards a dynamic one. Advanced and integrated shopping environments are emerging such as mobile-commerce, creative-commerce, social-commerce, which make consumers always able to buy whatever they want, no matter when and where (Pantano and Verteramo, 2015). Such digital marketplaces pave the way for shaping a brand new and ever changing shopping experiences might jeopardise the traditional points of sale, because the online ones able to involve consumers in new and immersive experiences that can be shaped also using self-service technologies (Pantano and Priporas, 2016; Fotiadis and Stylos, 2017).

Even though the mainstream literature maintains that retailers are mere innovation adopters (Pantano, 2014), the primary role of innovation in gaining a competitive advantage in retail service domain is widely recognized as well as the shifting from new products to new retail services development (Perks et al., 2012). The spread of customer engagement in relational marketing and services marketing (Brodie et al., 2011) together with the real participation of customers to service development based on their active participation in co-creation processes changed the concept of innovation. Innovation in service research delves on users' role of co-innovators, underlining that organizations should listen and learn from customers who became active actors in service creation. What is more, the spread of digital technologies has reshaped the nature of services and the processes of service exchange. This led retailers to reframe their business conduct, calling for new capabilities grounded in open and flexible layouts, to actively respond to changings markets and successfully manage innovation (Hagberg et al., 2017; Pantano and Verteramo, 2015). S-D Logic (Lush et al., 2016) reinterpreted service exchange as the concrete application of digital solutions to resource integration in order to foster value co-creation and, in so doing, boost the rising of innovation. Thus, S-D Logic introduces service ecosystems (Akaka et al., 2013; Chandler and Vargo, 2015; Vargo and Lusch, 2016) to exploit the complex and multi-dimensional construct of value co-creation. However, the extant research still calls for an investigation of those mechanisms, which boost resources integration enhancing value co-creation processes in digitalized contexts (Barile et al., 2017; Vargo et al., 2017; Maglio et al., 2006). The lack of a holistic understanding of the drivers for value co-creation and of ICTs' influence on value co-creation (Maglio et al., 2006, Nambisan et al., 2017), inspired the investigation of fashion retail and its complexity due to the high competition, the changing and unpredictable demand, products' variety, an offering even more based on immaterial features and the growing importance of ICTs role (Ciasullo et. al. 2017). Therefore, this study aims at contributing to the current theoretical debate, investigating in practice the role that digitalization can have in enhancing value co-creation in fashion retail service. More in details, this paper tries to answer the following research questions:

RQ1: What are the main ICTs platforms and digitally tools that enable value co-creation?
RQ2: What are the drivers fostering value co-creation in fashion retail service?
RQ3: How ICTs platforms shape an omni-channel strategy?

The paper is organized as follows. Section 2 delves on the review of the literature on retail digitalization and the evolution of the retail service. Section 3 proposes the theoretical framework shaping a retail service ecosystem in a digitalized context. In Section 4 the applied research methodology is described. Sections 5 and 6 shows and discusses the achieved results. Close Section 7, in which implication and final remarks are presented.

THEORETICAL BACKGROUND

The Role of Digital Technologies in Retail

The rising of ICTs changed the retail industry calling for innovative business practices (Chen and Tsou, 2012).

Retail innovation management can be read according to two different dimensions, technology and market.

Technology perspective lies upon the main theoretical framework: Technology Acceptance Model (Davis, 1989), which is intended to analyse customers' acceptance of specific technologies. This approach is strictly linked to the management of advanced technologies with the aim of enhancing efficiency and effectiveness in service delivery processes, assuming different viewpoints (e.g. clients, vendors, retailers, etc.). The most investigated technologies are self-service technologies, Radio Frequency Identification (RFID), recommendation systems, mobile applications.

Fashion retailers have adopted new technologies especially in their points of sales with the double aim of facilitating a better communication flow between them and their customers, in order to boost customer satisfaction and loyalty, and, at the same time, to better understanding the emergent market trends (Chih-Hung Wang, 2012; Chong, 2013). However, the technology perspective is focused on a traditional and linear approach, according to which retailers are passive adopter of innovative technologies that other companies produce (Pantano, 2014).

In market dimension, retail innovation management is embedded in marketing theories, in which customer value is a cornerstone. Research on marketing in retail distinguished three different dimensions of value, adding to functional and experiential value, symbolic value, which is related to the possibility that consumers have to freely express themselves (Rintamäki and Kirves, 2017). This wave of research formed the conceptual basis for studies on holistic shopping experiences, resulting from multi-sensorial and inter-personal factors involved throughout the entire purchase process. In fact, several fashion companies have developed in-store marketing strategies, based on entertainment, design and customer involvement, boosted by multi-channel technologies, in order to encourage seamless shopping experience (Verhoef et al., 2009).

The advancement of the Internet technologies in retail setting has triggering its digital renovation and its ongoing development. Scholars put forward the idea of smart retailing, which combine both physical and digital dimension of retail (Kim et al., 2016; Pantano and Priporas, 2016). Shopping experience is shaped interacting with smart and automated systems and is boosted by that general sense of pleasure that stems from the numerous touchpoints that stimulate the involvement of customers (Pantano et al., 2018; Roy et al., 2018). These considerations emphasize, as a key theme, the importance of enhancing

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customer experience, exploiting the innovative potential embedded in digital artefacts. However, a smart customer experience is challenging, because require firms' digital innovation efforts.

Smart technologies cover different retail channels (Pantano et al., 2018) such as: digital technologies (e.g. social media and online channels devoted to e-commerce); mobile technologies, (e.g. retailers' mobile apps); immersive/pervasive in-store technologies (e.g. ibeacons, interactive storefronts and displays). The progressive digitalization of retailing involved practitioners and scholars in the recent and relevant debate about the way retailers, approaching different online and offline selling channels, should shift from a multi to an omni-channel strategy (Verhoef et al., 2015), based on the integration between online and offline retail channels (Herhausen et al., 2015). However, much of the extant research delves just on the potential that smart technology itself has in offering a shopping experience (Dacko et al., 2017; Willems et al., 2017), and less on retailers' ability in designing effective digital retail channels.

Smart Retail and Service Ecosystem View

The increasing relevance of intangible features involved in retail service delivery to enhance meaningful shopping experience coupled with pervasive role of digital technologies, emphasizes the opportunity to introduce a third approach to retail innovation management. In this sense, a knowledge-based approach can be embraced, assuming service-driven perspective, mainly steaming from Service-Dominant Logic (Vargo and Lusch, 2004, 2016) and Service Science (Maglio and Spohrer, 2008; Lush et al., 2008).

Even though traditional retailing put emphasis on retail channels and on dyadic interactions (between firm and customer), smart retailing has underscored the interactions among customers, smart objects, offering (e.g. products, services, brands), retailers, and even retail channels (touchpoints). Therefore, smart retailing can be re-conceptualized as a complex network of actors, who integrate their resources, products and services, in which the potential of digital artifacts triggers new and personalized experiences. In this scenario, networks of relationships built upon intelligent devices increase retailers' ability to offer not only smart services, which provide added value to consumers, but rather to co-create value together with consumers. Value co-creation can be also considered as a peculiar kind of innovation, which is inspired by consumers' ideas and experiences, who play an active role in value creation (Kohler et al., 2011). Service retailers call for consumers' involvement in those co-creation activities that go from new product or service development; thus, co-creation strategies cannot fail to consider consumer-to-consumer (C2C) interactions, intended as the application of his/her social and relational resources (e.g. friends, family or brand communities). In particular, the extant literature underlines that value co-creation can address one of the most challenging issues of online shopping, which is the switching of in-store to online shopping experience, as way to boost the engagement of customers (Blázquez, 2014) and to shape that integrated experience that multichannel strategies call for.

S-D Logic theory considers value co-creation as a cornerstone, approaching value as something that "can only be created with and determined by the user in the consumption process and through use" or what is referred to as value-in-use (Vargo and Lusch, 2008, p. 284). Value in use emerges via interactions that occur between users, providers and other co-creating actors. In a many-to-many perspective, value is always co-created by each stakeholder and user, who are considered active participants and resource integrators. Actors interact in a network of non-linear, dynamic and changing relationships (Gummesson and Polese, 2009) – linked by service provisions (value propositions). This led to re-conceptualize the notions of service and value exchange defining service exchange as the application of user's knowledge

and skills (operant resources) for mutually benefitting all the entities involved in the exchange. These interacting entities are defined service systems that include people, organizations, shared information and technology, internally and externally connected to other service systems. People and organization, define the interactions between individual and collective actors such as users, providers and the other systems entities. The relationships among the different members of a system boosted the unceasing exchange of information and knowledge. In this view, customers as well as consumers (people) are considered knowledge workers like any other stakeholder. Therefore, the differences between the roles of producer or consumer are faded away, because each actor is a supplier of information and skills (Vargo and Lush, 2011). Technology is considered as a dynamic resource, which enable knowledge exchange through a set of ICTs-mediated infrastructures able to enhance service effectiveness and value co-creation as well as the rising of innovation (Spohrer and Maglio, 2008). Finally, the information sharing takes place via technological tools, which help to be productive, continually developed and to generate and capture value, speeding the exchange of resources and value. So the actors involved in service interactions can be humans, but also technologies as smart ones. Smart technologies have re-shaped the interactions occurring with and between actors, replacing human-based interactions with technology-to-technology interactions (e.g. a digital cart that autonomously detect and track the products taken from or returned to shelves) or brand new, more personalized and contextual human-to-machine interactions (e.g. augmented reality and immersive technologies). S-D Logic, further developing the concept of service systems, approached service ecosystems (Akaka et al., 2013; Chandler and Vargo, 2015; Vargo and Lusch, 2016; Meynhardt, et al., 2016) to investigate the multi-dimensional construct of value co-creation and to exploit the opportunities by ICTs.

Service ecosystems are self-contained and self-adjusting collections of social and economic actors that share institutional arrangements and provide organizational structures and principles that facilitate the exchange and integration of resources and, in so doing, the co-creation of value-in-use with and among actors. Value co-creation can be considered as an emergent and interactive phenomenon, characterized by ICTs indirect ability in generating innovation, boosting interactions and knowledge exchange, through the emergence in-use of ecosystems. According to this multi-actor perspective and embracing a strategic view on value co-creation, innovation represents an interpretive lens for understanding the mechanisms and dynamics of value processes (Ramaswamy and Ozcan, 2014). In this sense, ICTs can be read as transformative resources, which have to be integrated with other resources to generate new knowledge in the whole service ecosystem (Wieland et al., 2012). The recombination of resources also boosts the ongoing renovation of markets, triggered by user's demands, technological changes and the emergent social needs. In others words, ICTs are central for value co-creation and for the optimization of operant resources. These latter, acting on operand resources, can be combined and exchanged in always novel ways in order create new value for each involved actor. This is the main raison according to which in service research innovation is not an outcome, but a complex process that involves discovering new way of co-creating value and in which the key driver of innovation outcome is knowledge, which can be shared through ICTs and supported by actors' willingness to collaborate. Embracing the perspective of focal actor (e.g. service retailer), one of the rising managerial issue is trying to define effective resource integration patterns in physical and digital context as well as in different stages of service exchange that boost smart value co-creation.

THEORETICAL FRAMEWORK

Moving from the research questions, this work aims to analyse if and how digital platforms facilitate value co-creation in fashion retail. More in details, merging the aforementioned conceptualizations, according to which service ecosystems seem to be the most suitable layout for mingling digitalization and the rising of mutual benefits a framework is proposed. It let to better understand both the holistic view and the analysis of individual elements as well as their relationships exploring the main drivers that foster or inhibit value co-creation. The fundamental antecedent of value co-creation and the micro foundation of resource integration is the engagement. This construct delves on an interactive co-creative process in which the internal disposition of actors is the condition *sine qua non* for engagement activity (Chandler and Lusch, 2015; Storbacka et al. 2016). The framework (Fig. 1) includes actor engagement practices operationalized as both the disposition of actors to engage and the activity of engaging to enhance the process of resource integration. Actors' engagement practices let to identify the main actors involved in service exchanges as well as the roles they perform. To better understand resource integration paths, the properties of actor engagement – e.g. cognitive, emotional, and behavioural dimensions – need to be analysed. These properties let to better understand temporal, relational, informational, and motivational benefits related to service interactions. However, actor engagement occurs in specific situational conditions, which shape differing levels of engagement. Thus, the definition of the context is fundamental to understand the way actors engage in resource integration. Therefore, two further elements the framework proposed: technology and institutional logic.

Drawing on Breidback et al. (2014) and Lusch and Nambisan, (2015) works, in ICTs mediated environments, interactive platforms represent the hybrid and modular-layered architecture for resource exchange. They include artefacts, interfaces, processes and people, which enhance opportunities of engagement. More in details, modular architectures increase flexibility, whereas layered-modular ones enhance generativity through loose couplings across layers in which innovations can spread independently in any layer according to a cascading effect. Different media, services, contents and devices are dynamically combined and recombined to create innovative services. This layout boost resource liquefaction and enhance density and strength resource integration, offering an increasing number of combinations based on bundles of specialized knowledge and skills, spreading from multiple devices, which nourish multiple innovations and the rising of new products and services. Therefore, interactive platforms are considered as intermediaries of connections or, in other words, they are able to play a leading role in increasing shared information among users and to boost the engagement, intended as a lever for co-creating new value. Hence, platforms take together actors and their resources, acting as actors' aggregators and triggering direct and indirect service exchanges. The role of technology is broaden acting as resources integration enabler (this is reason why ICTs are horizontal and transversal to the other dimensions of the framework). The growth of platform value for both the involved actors and the focal actor, triggering the rising of new resources, calls for mechanisms of coordination according to the institutional logic. Because value co-creation needs for shared collaboration processes, institutions act as fundamental coordinating mechanisms, which inspire and guide interactions through institutional arrangements. These latter are always created and recreated through actors' agency; thus, they enhance or constrain value co-creation. The merging of the conceptualizations let to operationalize them in the domain of fashion retail. In particular, due to the active role that technologies play in reshaping consumers' co-creation of new shopping experiences, the analysis of different engagement practices let to identify the digital

platforms that enable value co-creation process, highlighting the activities that led to create new value (e.g. innovation) in micro and macro perspectives. Thus the framework underscores a link between actor's engagement, platforms' use and value co-creation and identify engagement platforms those physical and digital touchpoints that facilitate service for service exchange between social and economic actors in order to trigger value co-creation and the rising of innovation.
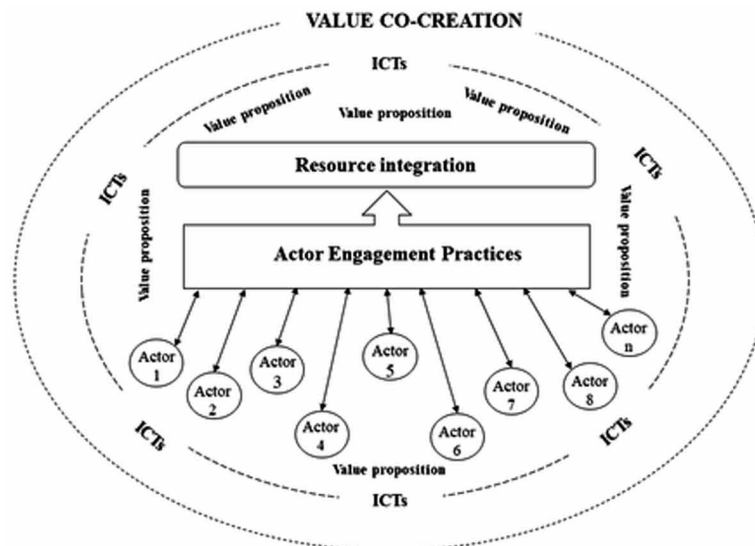
RESEARCH METHOD

Research Design

Being aimed at investigating an emerging phenomenon, the analysis is explorative and based on the multiple case study approach. The multiple case study is preferred to a single one with the aim to add accuracy to findings, being based on evidence rising from the cross-case analysis (Yin, 2015). Moreover, grasping knowledge from practitioners (Bonoma, 1985), the implementation of the multiple case let to respond to the "why" and "how" questions related to the phenomenon under analysis (Yin, 2015). In this way researchers can investigate practice-based phenomena and specific events in their natural settings.

Case Study Selection

Four information-rich cases with similar characteristics were selected according to the following criteria (Silverman, 2000). All the selected companies (Tab. 1) were medium and large sized and international brands; serve global markets (based on sales volume) and positioned in medium-high and luxury fashion market segments; their headquarters based in Italy and at least one point of sale in Milan (the European

Figure 1. Theoretical framework to re-read retail service ecosystems
Source: authors' elaboration.

Table 1. The main characteristic of the case companies

Company	Retail Sectors	Dimension	National Turnover %	Foreign Turnover%	Main Foreign Markets	N. of Interviews
Alpha	Apparel	Medium	38	62	North Europa, Russia, USA	3
Beta	Fashion	Large	45	55	Germany, Belgium, France, China, USA	5
Gamma	Fashion	Large	40	60	Europa, Russia, USA	7
Delta	Fashion	Medium	48	52	Europa, USA	3

Source: authors' elaboration.

fashion city), and using digital technologies (Tab.2). For each of companies, data related to how they manage digital technologies were gathered and analysed. For confidentially purpose, authors did not to reveal companies' identity, identifying them with the following labels "Alpha", "Beta", "Gamma" and "Delta".

Data Collection

A research protocol was defined to arrange the gathered data into digital worksheets in order to make the authors capable at analysing them individually and, then, critically reviewing them. Data were collected from March to July 2018 through personal unstructured interviews with 18 key informants (e.g. managing directors, operation managers, innovation managers, digital marketing managers, retail managers, selling staff) with more than five years of experience in that position.

The semi-structured interviews were divided in two main sections. The first one delving on the different technologies adopted by the companies: digital, mobile (e.g. mobile apps) and immersive in-store technologies. In the case of mobile apps, respondents were asked about the apps their companies used and their main features. Additional data (e.g. availability, accessibility, interactivity, user-friendliness, update rate, etc.) were gathered downloading the apps that each respondent mentioned. Then, to analyse the immersive in-store technologies, some questions delved on their characteristics. The second one pointing to grasp, through engagement practices occurring in digital platforms, if and how the case companies co-create service in their smart context.

Table 2. Case companies adopted digital tools and future enhancement projects

Company	Social Media	Digital Tools	Apps	Immersive Technologies	Future Projects
Alpha	Instagram, Facebook	Yoox, Net-a-porter	None	None	Corporate app
Beta	Instagram, Facebook, Google+	Yoox, Mytheresa,	Corporate app	Interactive displays, smart windows	Indoor immersive technology
Gamma	Instagram, Facebook, Pinterest, Google +	Yoox, Mytheresa, Net-a-porter	Corporate app	Interactive displays, smart and memory mirrors, smart windows, smart shelves, virtual fitting through facial and body recognition	Wearable technology, Customer digital assistants.
Delta	Facebook,	Yoox	None	None	None

Source: authors' elaboration.

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The open-end questionnaire included 25 items, formulated as direct questions. The respondents were approached face-to-face and the interviews lasted at average 30-40 min. Data were collected and classified in homogeneous categories in order to improve the comparability of the obtained evidence and, then, triangulated with secondary data (e.g. company profiles, annual reports, social media, e-commerce channels, mobile apps) in order to boost research reliability (Yin, 2015). The coding process was iterative, being based on the classification, testing and redefinition of gathered data through a critical debate between the authors following a thematic approach (Eriksson and Kovalainen, 2015). Finally, a research report was written.

FINDINGS

Company Alpha

Alpha implemented digital technologies (Tab. 2) for involving customers in e-selling activities. Alpha used Facebook and Instagram to engage customers in collaborative conversations about corporate offering and/or the shopping experience. Via social media, users (e.g. digital staff, consumers, followers, fans, etc.) could access, create and/or publish personal contents (e.g. posts, images and videos), while via interactive tools (e.g. messenger and direct) Alpha communicated online with the community. Yoox and Net-a-porter were used to reach a broader audience or those customers who usually did not know the brand or were not interested in it. The company was evaluating the opportunity to develop a corporate mobile app to boost the availability of its offering and to retain customers. Regarding the engagement practices, Alpha offered to its users a quick tutorial about the rules and policy of its forum and chat, accessible via corporate web site. Users were welcomed with these messages, "*Thank you for registration and welcome to X! To enjoy our web site, please, read this short note!*" "*The forum is only for the use of our customers and it is a condition of registration that you provide your full name, address, personal details of your interment behaviour, and a valid work email address*".

Having adopted just the website, the most popular social media and some well-established digital fashion retail channels, this company supported consumers, users and followers, responding to their comments via email or via instant messaging system (instant chat, messenger, direct, WhatsApp). Follows an example of the interaction between Alpha digital staff and a user. "*You can create as many lists as you'd like, but we recommend maintaining a single list and using segmenting data to manage your desired clothes*". Another practice for supporting user is the following. "*Is there someone that can help me…I cannot access the link to the shopping page!*" Alpha digital staff few minute later replied, "*Please, refresh your browser or cut and past the address in a new page*".

Alpha was used to publish advertising, promotion of special events, products and stores' photos as well as the related information, to which public reacted asking for information, appreciating or not (e.g. Facebook likes), commenting them via messenger, direct, website forum or email. Follows an example of Facebook interaction between followers and the company. "*Save our planet and each human being! Do not buy and wear fur!*"; "*Alpha do not sell any fur clothes or apparel, keep in mind!*"; "*Y, we invite you in our store to personally test our products. You will find them totally fur-free*".

Alpha social media let its consumers and followers to self-arrange online and offline initiatives, which in almost all case were positive. For example, online channels supported a self-arranged action to boycott Alpha fur clothes. Thus, on corporate Facebook page a follower published a post in which called for the participation to a flash mob against the use that Alpha was doing of leather and fur. This post had 1.045 likes and supportive comments, which could not be contrasted by corporate comments. After the clamour of this initiative, the company demonstrated its sorrow and gradually reduced the use of the incriminate materials. Even if Alpha was used to gain in store insights on people perception about its products, it could also learn online about customers' needs, desires and expectations, reading posts and analysing the journey that they shaped through each touchpoint. Consumers, followers and fans could share and learn about the company from not only corporate contents, but also other followers' activities.

Company Beta

Beta used social media, some digital tools, a mobile app and indoor immersive tools to shape a user-friendly and integrated shopping environment, characterized by the same interfaces, artefacts and functions (Tab. 2). Focusing on immersive indoor technologies, in its flagship stores Beta adopted some interactive displays, showing products' images, interactive videos, commercials, cultural and tourism recommendations, lifestyle suggestions. These displays offered information that users could customize, after the registration of their personal information and preferences. Some smart windows, developed upon Microsoft Kinect technology, were implemented in Milan, Rome, Florence, Paris, London and Madrid. The company stored all information, gathered interacting with customers at each physical and digital touchpoint, into a database integrated with the central informative system, which – through its function of data analytics – could extract information for the ongoing improvement of service.

During the first access to the corporate website, to the mobile app and the indoor immersive tools, Beta provided an essential guideline on the fair and polite online behaviours as well as on the self-directed activities allowed online. After the first access, this brief guideline was accessible on-demand thorough the functions "general policy" and "how to be".

Beta used digital platforms to promote the dialogue among the members of the online community and with its digital and selling personnel as well as with its service and technological partners. The aim was promoting a free dialogue on Facebook, Instagram, Google + and even on the corporate forum, in order to create that sense of general safety and of belonging to a group that usually make consumers, followers, partners and corporate personnel (e.g. designers, web service developers, e-marketers, etc.) willing to share their resources. Informative flows are shared online in the form of comments about the offering, narrations of previous experiences or new ideas and insights about the most recent fashion trends. In so doing, Beta was often inspired by new and sometimes unconventional idea gathered outside its own design or technology labs. Through digitalization, the company encouraged mutual social interactions, involving people in formal and informal discussion not only about corporate offering, but also about the liveliest issues. Follows a Facebook interaction between a consumer and other community members. "*I'm really excited! Yesterday I used the new touchscreens of Milan store. It was terrific! I chose my outfit by myself, tried it and paid. Has anyone done the same?*". A great number of followers were engaged in that discussion (2.560 likes), sharing their experiences (250 comments). Beta, through its management software, approached in an integrated way, information and data gathered from all its social media. Some members of Beta online community planned and tried to developed some social and participative initiatives. Just one of this took place, which virally shared on social media photos

in which users were wearing corporate outfits and which other followers voted with their likes; then, Beta decided to publish the three most voted photos on its corporate website, in the section F/W 2017 campaign. In this direction, Beta digital marketing manager affirmed that this promoted a general trust in the company and commitment with brand. Moreover, as managing director stated, Beta, through interoperable informative systems which span into the supply partners' network, let to share information to improve the possibility to learn something new about consumers and followers' purchase behaviour. This implied that Beta employed personnel with specific competences in computer sciences in order to improve or change digital interfaces and to make them as compliant as possible with users' needs and social behaviour.

The open online dialog engaged with selling personnel, partners, consumers, followers and fans, let Beta plan and develop together with these actors several initiatives. In particular, the in-store interactive displays and the smart windows let consumers arrange their outfits with the existing clothes and accessories as well as create new and personalized ones. Thus, they could personally design t-shirts, print, pick and pay for them in real time. Using these immersive technologies, consumers could also re-design other existing clothes, sending the "project" to designers via instant messaging and waiting for the approval and/or some changes proposals. Beta approached social media as a virtual agora, in which all the actors involved could share ideas about new concepts or new promotional, social or educational initiatives. For exploiting this potential on its Facebook page, Beta developed the so-called "discussion lab", in which followers could freely express themselves or discuss about specific topics, offering their point of view. Community members could share information about materials, design and techniques to avoid any counterfeit that engaged Beta designers, its digital staff and users. Beta retail manager argued that the commitment of online community inspired its participation to the contest for designing the uniform of an important Italian women soccer team. Approaching in an integrated and interactive way its digital platforms, Beta was able to rethought and made the offline and online experience as fitting as possible with the desires and needs of its online community. Stimulating an ongoing and active participation in specific activities pointing to rethink and/or co-create product and services, Beta empowered its online community.

Company Gamma

Gamma managed several digital platforms as supportive channels to involve and help users (Tab. 2). The indoor immersive technologies (e.g. interactive displays, smart and memory mirrors, smart windows, smart shelves and virtual fitting rooms) coupled with digital technologies (social media, digital tools and mobile app) made customers able to interact with company in real-time (e.g. via online chat room, online customer service, etc.) and to share information (e.g. feelings, choices, preferences, suggestions, eventual complains, etc.) about their experience.

The interactive displays, installed in each Gamma flagship stores, offered a products' selection personalized according to each customer's desire and profile as well as information about those products that customers hesitate to purchase. Moreover, for each selected product, the displays provided information about materials, prices, reviews or substitute models, as well as other customers' thumbs in order to give emphasis to other people preferences, presented in a similar way of Facebook's likes. This contribute to create a strong sense of belonging, safety and loyalty among the members of digital community, who were also highly committed with the several online corporate activities.

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Interactive displays were also connected to smart shelves to make customers able to get the product assembled and/or selected through the screen, which also provided additional information related to product material, price, size as well as the number of people who purchased it. Interactive displays and smart shelves offered also leisure contents to delight the shopping experience proposing entertainment, tourism, cultural, commercial or promotional contents. In fact, in Milan, Venice and Paris flagship stores, Gamma managed a high-profile entertainment service, broadcasting via the interactive displays information about local amenities, attractions and events, such as Michelin-rated restaurants, concerts, exhibitions, rental services, accommodation. Gamma adopted also smart windows, which showed an avatar model with the outfit selected by the staff. Touching the body of the digital model, customers got information (e.g. material, size, price, availability, possible combinations, etc.) about the outfit. Finally, smart and memory mirrors were also implemented to make customers capable at comparing different products through a system of virtual fitting, which supported purchase decisions, communicating online with company staff and/or with neighbouring users. Using smart mirrors, customers could also ask selling personnel for a physical try of the selected clothe and communicate online the final purchase decision to the teller. In this way, customers could switch from one to another channel and, in so doing, living a seamless service experience.

To get an open, fair and polite use of its digital platforms, Gamma provided users with detailed information about norms, guidelines and policy about what they could do or not online.

Through the indoor immersive technologies, deeply integrated with other digital platforms, users could talk together about their past, present, possible or expected service experience, writing comments, reviews, suggestions, rating products or digital contents (commercials, videos, photos, etc.) or just narrating the way they use products. Gamma tried to boost the interactions not only between personnel, partners, customers, followers, fans, but also among their personal network, involving them in an online open dialogue, based on an ongoing and open information sharing, which let Gamma personnel, partners and its community to always learn something new not only about corporate products and service, but also about some issues. Social media platform enhanced the dialogue among Gamma personnel, technological and/or service partners and users, who shared ideas about the possible improvement of the corporate offering. Follows an online interaction between a Gamma partner and a follower. "*Go on our App store to download the app. Register yourself on the store, record your personal information and, remember, to select the payment system*". "*Great shot! I visited the Milan store and used the smart mirror. Wow, it was exciting. I saw myself with the chosen outfit and then I directly purchased it online with my credit card. I found my gold and sparkling shopping bag at the desk*".

Gamma online consumers together with fans and followers planned and developed several initiatives, which had a great online and offline echoes, which demonstrated the strong bonds that emotionally joined the online community as well as with the company. Some followers organized periodical discussion on how to fit Gamma clothes. After some time, these meeting were called "fashion for a week", which encouraged Gamma 658,000 followers to join to the discussion together with one of the worldwide most important influencer, exchanging ideas, suggestions and opinions. Followers could also participate to specific meetings and to the editorial board. The close collaboration with the influencer exploited the meeting topic and its communication style. She posted on Facebook corporate page "*This initiative is terrific! Thus, it takes consumers, followers and fans 'on board' making them an important part of this 'magic' world*". Exploiting its physical, digital and multi-sensory touchpoints, Gamma boosted the interaction, the participation, the dialogue and the sharing of ideas, pushing actors to learn

always something new from each other past experiences and their future intentions. To face the rising number of allergic people, the company enacted another practice, sharing information about the over-sensitiveness of its products, supported by National Health System data as well as consumers and followers posts. Gamma developed a life-long learning online platform (Gamma Geek Bar) for exploiting its personnel's technical (e.g. design, technological, selling, etc.) and managerial capabilities thanks to some experts' interventions (e-advertising expert, e-marketing practitioners, etc.). Reading Facebook and Instagram posts, Gamma grasped the need for improve store and fitting rooms' accessibility; thus, to respond to community demand, the company developed smart mirrors and smart fitting rooms together with a technological partner. These tools were co-tested together with some disable consumers and a representative of its selling personnel in order to verify if they effectively enhanced accessibility and allowed to digitally try the outfit they prefer, thanks to the body recognition system. Managing and always updating its digital platforms, Gamma developed close relationships with personnel, technological and service partners, consumers and followers/fans, which triggered the rising and sharing of new services. In particular, Gamma used digital to involve personnel, partners and people in the ideation, design or redesign of products and services. The company was used to involve a consumers' representative in testing new shoes' models to really grasp the importance of some components (e.g. ergonomic, texture, heels, etc.). After the online interaction, Gamma asked to a subset of consumers to test the in the shoes in their daily life and to send back their impressions via corporate website and social media. Gamma innovation manager maintained that this was mainly due to the commitment and the real empowerment of community members, who could actively participate to those activities that were traditionally done just by specialized personnel.

The interactions between Gamma personnel, consumers and fans occurred also in store, where, if asked, they acted as personal consultants. Consumers could have personal shoppers who supported them in finding, choosing and purchasing specific outfits. However, personal shoppers could also ask and register on their tablets information gathered during the shopping session about consumers' habits, needs, characteristics and, even, about what's new they would like to find in store in terms of products, services, shopping environment, facilities.

Company Delta

Delta was focused just on those technological innovations designed for supporting operation activities. It was not interested in those advanced technologies pointing to facilitate the interaction with customers and their network; thus, Delta was active just in the traditional e-commerce, performed via corporate website and, partially, via Facebook. In fact, the company used this social media as a channel for sharing selling and promotional information. Delta affirmed that no activities or programs were planned in terms of new or innovative technologies implementation.

Delta provided users with just a brief online guideline to the use of its corporate website and the related e-commerce application, in order to support consumers and followers in their online journey with its offering. The company managed its digital tools constraining the online dialogue and access to the service. In fact, Facebook corporate page did not supported followers in sharing their impression and experience posting personal comments, because Delta did not allow the free publication of user generated contents. Delta did not use any digital platform to promote participative initiatives or activities, pointing to improve or change its value proposition, as well as to promote a participative re-thinking of its

offering. Therefore, Delta did not consider digital platforms a real support for customers' self-organized initiatives. This was due to the fact that Delta mostly interacted with them in flagship stores or during exclusive initiatives organized just for few selected partners and consumers. Therefore, these latter could experience corporate service just reading website contents or Facebook posts.

DISCUSSIONS

The results achieved shaped a multifaceted scenario due at the different approach to manage digital platforms and, the different disposition towards the involvement of consumers' network. The findings let to define some practices (see Tab. 3), which trigger different levels of engagement. These levels range from a passive, or pointing to respond just to functional needs via digital (e.g. regulating and assisting), to a growingly active engagement, in which emotional, behavioural and cognitive dimensions are shaped by the following practices: talking about, mingling, learning together, making together and re-thinking together. Moreover, service interactions occurring in the last three practices spread their effects beyond the service delivery, to embrace the whole service co-creation enhancing an ongoing process of innovation.

Delta was able to enact just 1# and 2# practices. A sets of actors was engaged just at a functional level. The practices were aimed at define specific and formal rules, pointing to enhance and regulate digital touchpoints access, to reduce information asymmetries between the company and the community and downgrading the costs of information search and the perceived risks which might support individuals in joining and/or participating in the community (Brodie et al., 2013). Therefore, Delta, via corporate web-site, Facebook and Yoox, tried to enhance e-selling activities and to support the offline selling activities and to further engage consumers with its physical points of sales. Moreover, the way Delta approached digital platforms made the digital staff engaged with their own roles of platforms administrators, infor-mation providers and human interfaces which handle consumer queries.

Alpha interactively managed digital platforms, enacting 1#; 2#; 3#; 4#; 5#; practices. In particular, the first two practices functionally engaged the digital staff and the whole community in those activities pointing to regulate their access, use and behaviour. The 3#; and 4# practices' boosted the emotional engagement of different actors belonging to the digital community. This led to create empathy, sense of belonging to a group as well as a sense of general safeness among community members (Brodie et al., 2011, 2013). These practices might contribute to make the online community emotionally attached and loyal to the brand, which can improve customers' retention rate. In particular, the 3# practice enhanced

Table 3. Case companies engagement practices

Company	Engagement Practices						
	1#Regulating	2#Assisting	3# Talking About	4# Mingling	5# Learning Together	6# Making Together	7# Rethinking Together
Alpha	✓	✓	✓	✓	✓		
Beta	✓	✓	✓	✓	✓	✓	✓
Gamma	✓	✓	✓	✓	✓	✓	✓
Delta	✓	✓					

Source: authors' elaboration.

the community satisfaction with the service, commitment and trust in the company (Shuck et al., 2014). The 4# practice, being based on the free information and experiences collecting and sharing in the community, made its members joined each other by a strong sense of belonging as well as really empowered, being able to co-create value in use, without necessarily interact with the company. Finally, the 5# engaged cognitively (Hollebeek, et al., 2014) the case company personnel and the online community in specific activities. These were, for example, sharing information, which led to create valuable relationships able to enhance the co-creation of new services and boost a more compelling shopping experience.

Beta and Gamma shaped all practices. The 1# and 2# functionally engaged Beta and Gamma digital and selling staff as well as the community, defining the rules for accessing digital touchpoints and for actively design the service journey. Moreover, Beta and Gamma emotionally engaged their personnel, supply partners and the community through 3# and 4# boosting among community members the sense of belonging to, the trust and commitment to a specific group and, therefore, the willingness to join to service activities. Moving to 5#; 6#; 7# Beta and Gamma engaged personnel, partners and the community in an increasingly strong way. Thus, 5# cognitively engaged them in terms of mutual information sharing that let the companies and the online communities to always learn something new about each other. By 6# and 7# the case companies cognitively and behaviourally engaged actors in all the activities that led to co-produce and/or renovate their service portfolio (e.g. co-ideation, co-design, co-development, co-testing and co-launch) (Russo-Spena and Mele, 2012). These practices enhanced those cognitive and behavioural competences, which made the case companies, their partners and communities empowered in a collaborative decision-making. Co-create service experiences involve the community in a service experience and encompass networks of actors, who co-create new knowledge able to boost not only customer journey, but, rather the wellbeing of the whole retail service ecosystem. 6# and 7# boosted that information, knowledge and experience sharing at the core of the creation of further knowledge, fundamental for an ongoing service innovation.

The different engagement practices let to define the role that digital platforms assumed for each case companies as well as the different retail strategies (Verhoef et al., 2015) (Tab.4).

Delta managed digital platforms as single and not interacting touchpoints dedicated to mere e-commerce activities. They can be considered as transactional platforms, supporting just temporary or instantaneous customer-firm exchanges (Breidbach et al., 2014), which fails in promoting any interaction with and among different set of actors. Being passive or "attendant", Delta multi touchpoints constrained the engagement of actors and their resource integration. Alpha approached digital platforms in an interactive

Table 4. Roles, interactions and platforms

Company	Role	Type of Interaction	Strategy	Platform
Alpha	Facilitator	Consumers can boost interactions in a partial or full way, retailers can facilitate them, but partially integrate tem	Cross-channel	Service Platform
Beta	Orchestrator	Consumers can boost all the possible interactions as well as retailers, who orchestrate their integration	Omni-channel	Engagement Platform
Gamma	Inspirator	Consumers can boost all the possible interactions as well as retailers, who inspire their integration	Omni-channel	Engagement Platform
Delta	Attendant	Consumers cannot boost interactions, which are not integrated and retailers attendant	Multi-channel	Transactional Platform

Source: authors' elaboration.

way, shaping a service platform managed according to a cross-channel strategy. The use of a modular architecture, built upon tangible and intangible devices, facilitate actors' interactions, their access and the integration of resources (Lusch and Nambisan, 2015). The service platform acted as "facilitator" of interactions, being able to boost circular communication flows that enhance information sharing and shape co-created value propositions. Through the service platform Alpha supported and facilitated networks of actors in mixing and matching resources at one or another digital touchpoint.

Beta and Gamma managed digital platforms in a totally integrated way, adopting an omni-channel strategy that made their physical and digital touchpoints widespread, interacting and completely integrated. A mixed and loosely coupled architecture (e.g. modular and layered) has allowed resource liquefaction, that let to increase the number of the potential combinations creating bundled set of specialized knowledge, which spread through multiple devices and nourish an ongoing service innovation. The switching from one to another touchpoint was allowed not only to consumers, but also to all the involved and committed partners, who could use similar interfaces and artefacts. Beta and Gamma fashioned an engagement platform in which human, cognitive and relational dimensions are integrated, shaping an active, accessible, dialogic and reflective (adaptable to the emerging changes) participation into service exchange, which boosted the rising of new co-created value (Ciasullo, 2018).

A wide set of devices shaped personalized user's experience as in the case of mobile apps. These enhanced the sense of the trust, belonging to and commitment into a community and actors' empowerment as well as the rising of a strong customer intimacy (Kai-Uwe and Yu Zhou, 2012) making individual customers able to access applications in the right way and with the right quality. However, the engagement platforms assumed different roles. Beta engagement platform acted as an "orchestrator", coordinating the integration of resources shared through any possible interaction between actors, while Gamma engagement platform acted as an "inspiratory", enhancing a creative approach to those service experiences co-created with all the possible interacting networks of actors. In other words, people and processes are embedded in the process of value generation and in an ongoing service co-innovation. Thus, engagement platforms in a smart retail service ecosystem, acting as intermediary of connections (meso level of retail ecosystem), can shape and adjust the whole retail ecosystem, changing its nature and dimension and, in this way, contributing to systems' survival. In particular, they shape a peculiar system or a stabile architecture, enabling and enhancing the ongoing sharing of information with machine-to-machine (M2M), machine-to-people (M2P) and people-to-people (P2P) interactions. These interactions enhance the creation of new knowledge, that is active and transformative resources, which can innovate in a multi-levelled net of actors and which effects from micro to macro level and vice versa according to a recursive logic. However, value co-creation processes are enhanced thanks to actors' attitude and capabilities as well as the role they perform. Value co-creation experience, collaboratively built during the interaction between actors, is shaped thanks to practices that nourish users' engagement and empowerment in terms of psychological, emotional and cognitive connections. This led to make consumers and their peers more and more willing to collaborate, becoming part of a value co-creation process (Grönroos, 2011), in which they interact to provide resources (time, knowledge, social capital), to integrate the resources provided by others and to generate their own value. At the same time, practices of engagement and in-use interactions involved also the retailer's network. Regulative, normative and cognitive rules (institutions) fostered a shared awareness essential to capitalize the different expertise and capabilities of actors' network. For the retailers companies, the institutional co-creation of new value (innovation) occur in three mains ways (Koskela-Houtari, 2016): a) including new actors (e.g.

influencer, online shopping assistant, e-advertising expert, etc.), b) redefining roles of involved actors (e.g. customers and peers as co-ideators, co-designers and/or co-testers, etc.) and c) reframing resources within service ecosystems (e.g. the flagship stores that added to traditional selling activities leisure, cultural and lifestyles initiatives; the discussion lab that went beyond the traditional events offering new occasion to talk about different issues; the Gamma Geek Bar that completely reshaped the way to approach the employees life-long learning, etc.).
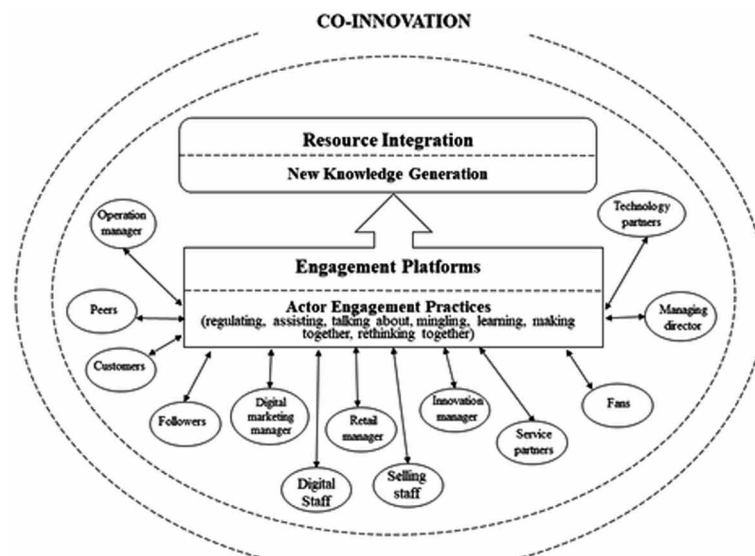
Managing engagement platforms, service retailer can increase customer's experience and enhance value co-creation, which, in turn, strengthens user's knowledge and generates innovation (Fig.2).

IMPLICATIONS, LIMITS AND FINAL REMARKS

The findings contribute to theory highlighting some advancements in the extant research on value co-creation in smart retail ecosystem investigating the role of technology in exchanging services. The investigation tried to recognise if and how digital platforms enhance value co-creation experiences as well as to describe the outcome in terms on service improvement and innovation, trying to respond to the call for better understanding the intriguing relation between smart technologies and service innovation in retailing (Wuenderlich et al., 2015).

Concerning RQ1, the findings pointed out that smart technologies should be used as an integrated set of platforms, shaping a stable architecture, built upon a collection of complementary digital devices (e.g. touch screen, smart displays, smart windows), artefacts (e.g. mobile apps) and interfaces (e.g. corporate web sites, digital tools). These are multiple touch-points which channels are managed to speed the interactions in the actors' network and the related processes, nourishing resource exchange. In this way, digital platforms shape engagement platforms intended as multisided intermediaries of connection,

Figure 2. Smart retail service ecosystem
Source: authors' elaboration.

which enhance actor engagement providing access and engagement opportunities. This led to answer to RQ2 aimed at investigating the main drivers that foster value co-creation in fashion retail service. As findings showed, even though technology is an enabler of resource integration, it cannot perform it and, therefore, successful value co-creation without the intervention of human component. In other words, engaging practices, fostering the empowerment in terms of psychological, emotional and cognitive interactions, boost actors' disposition to collaborate and to share their resources. The engaging practices act as valuable coordinating mechanisms, which enable smart interactions with and among network of actors, leading to share ideas, knowledge, experiences and institutional arrangements in the whole retail service ecosystem. Thus, engaging practices trigger a shared awareness (Nambisan and Sawhnaey, 2007) and/or a shared worldview (Lush and Numbisan, 2015) that nourishes cyclical process of information sharing, which led to always renovate the way to co-create value. The main managerial implication is the need for managing digital technology as strategic driver for value co-creation. An integrated and strategic management of ICTs in the whole value co-creation process is, therefore, confirmed when an omni-channel strategy is shaped (RQ3). The interactive logic at the core of engagement platforms coupled with an omni-channel strategy can change their role, turning them in real and interacting actors, able not only to combine/hold together different actors, but also to act as a multisided intermediary of connections. In this case, engagement platforms can boost the share of information with the common purpose of creating new knowledge and, in so doing, adding a growing quality to service experience as well as shaping new co-creational scenarios.

Assuming an omni-channel strategy (Hansen and Sia, 2015), fashion retail mangers can exploit the potential of engagement platforms in managing and analysing massive information flows (Pinto et al., 2017). This let to enhance corporate processes, optimizing operations, defining and updating price policies, predicting demand and offering an ever-updated service, based on customers' desired configurations (Hwangbo et al., 2017). Retailer managers should wisely adopt cloud computing, end-user devices and the IoT should always engage and stimulate resource integration and knowledge renewal throughout the whole process. Therefore, smartness goes beyond the pure application of smart technologies, supporting those digitalized forms of collaboration and value creation that lead to innovation and competitiveness. Last but not least, smartness could be defined as a meta capability able to foster a concrete competitive advantage.

Although this study provides interesting insights, some limitations should be considered. First, the study delved on a qualitative approach, limited to the analysis of four medium-high and luxury fashion retail brands, while a wider sample could improve the generalizability of the achieved results. Second, a quantitative approach could reinforce the proposed theoretical framework (for example statistical correlation between value co-creation, use of ICTs and innovation). Finally, further research is needed to better understand the dynamics of actors' experiences with smart technologies.

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Chapter 13

The University in a
Retail Context:
An Illustration of Value Co-Creation
Through the Social Business Model Canvas

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ABSTRACT

On-campus retailing is a spread practice, but academia has almost underestimated its potential. Nevertheless, not every type of retail activity adds value to customers and society. When the proposed value is society-driven and sensitive to consumers' wellbeing, customers' engagement increases. One business model, through which it is possible to exploit the benefits of on-campus retailing by adding social value, is the Yunus Social Business. This is a case-based study aiming to describe, through the Social Business Model Canvas, the founding of an organic shop within a university that is supplied by administrative staff of the university that are at the same time also local farmers. Further, the shop aims to resell organic food to university staff and students. The case study is theoretically enriched by traditional Porterian frameworks and new service frameworks such as the service-dominant logic by emphasizing the role of value proposition, value co-creation, and value-in-context.

INTRODUCTION

Retailing is known to be an important driver for economies throughout the history. This touch point of businesses to the consumers evolved in time according to plenty dimensions: locations, layout, management etc. It is not coincidence that, John Wanamaker who is known as one of pioneers of marketing application was retailer (Tucker, 2011). Retailing is very crucial for cash generation for businesses, also with its nature opens great opportunities for marketing activities.

It can be said that the influence of university campuses in our lives had the same trend in the history. By the beginning of 20th century the premises of universities got more important. Apparently, this was affected by industrialization and as its consequence by the increasing appreciation toward obtaining degree. In modern times students spend notably much time at campuses. University premises satisfy multiple human needs that go beyond learning. Universities may provide plenty of other services to students, going beyond standard students' cafeterias. Furthermore, if we analyze the time spent by students on campus and their needs, then, on-campus retailing deserves to be considered. Interestingly, academic literature is almost indifferent on the topic. To have this blindfolded vision to the phenomenon which is just there, next to academicians, is quite surprising. On-campus retailing seems to be more than an issue of solving basic needs of students but has larger impact.

Considering the university in a retail context may cause a focus shift from education to commerce. Nevertheless, the university should not be seen as a bureaucratic machine that deals only with classroom schedules, teaching activity, exam papers, research, accreditation reports, etc. Universities are multi-stakeholder environments and populated by several types of actors manifesting various interests. These supra-systems have different expectations from the university as a viable system, and the viability depends on satisfying stakeholders' expectations. Universities, like other organizations (traditional businesses, NGOs, social businesses, etc.) have the surviving need. To ensure the survivor, the university must behave like a business system, aiming the customer satisfaction. Thus, the main question here is: who are the customers of a university and what are their needs? The answer looks quite automatic if to consider the student as the main beneficiary of the provided services. But what are the provided services in terms of value proposition? Normally, in a university campus, students are expecting to build a university life made up of several dimensions (and not just books and classrooms). So, they have an ecosystem of needs, and consequently the university campus must be designed as a service ecosystem. In this way, the learning process may benefit as well. For instance, just by building consonant relationships between a university campus and local businesses, opens the door to many opportunities for students, like business incubation, career fairs, internships, and so on. As a result, the learning process benefits as well. However, students to be more engaged, they need many facilities inside the university campus, especially in cases of campuses located outside the city center. To satisfy basic students' needs related with gastronomy, exercise and fitness, leisure and entertainment, etc., the university must build an on-campus retailing ecosystem.

Besides the powerfulness of on-campus retailing, business ethics and corporate social responsibility must take a place for bringing some larger social impact in the life of students and staff. Unfortunately, the social factor of on-campus retailing it is totally neglected by academia. The university as a retail context may offer new employment opportunities and create positive examples by applying social business norms, as the university premises are significantly sanitized in terms of ethics. Here given factor makes us to think that business established within university can serve better and more ethically to the

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society and ecosystem. One driver for doing it can be the social business or generally speaking the social entrepreneurship as macro-category that somehow includes also social businesses.

Social entrepreneurship is not a new phenomenon (Shaw and Carter, 2007) and comprises three important components that are: identifying the social problem, identifying an opportunity to provide solution to that problem, and bringing new equilibrium (Martin and Osberg, 2007). According to Mair and Marti (2006), the integration of the created economic value and social value is possible in the practices of social entrepreneurship, and even more in the *social business*. But what is a social business? What are the differences with a charity, traditional business, and social entrepreneurship? Yunus et.al. (2010) defined social business as a business similar to traditional business in terms of profit making. The main obvious differences are: the primarily objective of this business is to improve a social problem (e.g. unemployment, health, pollution, poverty, etc.), and non-distribution of dividends (Yunus, 2008, 2017). The last condition differs social business also from social entrepreneurship. Moreover, social business should be able to cover the operational costs and this characteristic makes it different from non-government organizations. Thus, a social business is a bridge between a charity and a traditional business. Like a charity it works to solve a social problem, and like a traditional business it is financially sustainable because all the profits are reinvested to help the business grow and benefit society. On the other hand, there is a difference between a social investor and a traditional one. The latter invests for his own benefit; instead, the social investor invests to benefit others. When a social business becomes successful it pays back the initial investment, and since the social business is non-dividend based, all the quotas are reinvested by developing the same social business or investing in other social business ideas.

The following case is a business plan for building a social business inside a university campus. So as, to give to the on-campus retailing a social dimension: that of the social business. The social value in the present case is related with offering organic food to staff and students of EPOKA University, and as a result contributing in improving their health and gastronomic awareness, besides the social value derived to other stakeholders. This is a typical case of on-campus retailing with the sole difference that it is operated through a social business model.

For designing the social business plan, it has been used the Social Business Model Canvas. In order to assist individuals in starting a social venture/business, the Center for Social Innovation in Stanford Graduate School of Business has created a suitable business model canvas[1]. Therefore, this study uses this canvas model in order to explain the building blocks of the social business initiative.

The present research is not limited only to provide a potential "best practice". It also contributes to the social business theory and to the existing literature of on-campus retailing by adding a new component that to our knowledge and following literature review, has not been mentioned in previous studies. This new component is the new mindset proposed in 2004 by Steven Vargo and Robert Lusch that is Service-Dominant Logic. Moreover, during the building blocks explanation of the canvas are included other views that derive from literature. Hence, building an inclusive explanation of the Social Business Model Canvas.

Regarding the conceptual structure, this chapter starts with analyzing the university in a retail context, taking into consideration interdisciplinary studies and dimensions related with on-campus retailing. Afterwards, it is introduced and developed the case study through the canvas model. In the concluding part are discussed the final remarks and the future perspectives.

DIMENSIONS OF ON-CAMPUS RETAILING

Health Impact of Items Sold On-Campus

University cafeterias mainly try to fit to daily routine of students. If to consider franchises spreading on-campuses which are mainly fast-food chains like Burger King, KFC, Crispy Cream Donuts, Subway etc. (Lee, 2004), then items creating daily diet of students seems quite unhealthy. Even unbranded internal cafeterias serve same types of products like pizzas, burgers and donuts. Above the average weight gain during the university years is studied by many researchers (e.g. Huang et al., 2003; Levitsky, Halbmaier & Mrdjenovic, 2004; Racette et al., 2008). It is tightly related with unhealthy diet of university students (Small, et al., 2013; Horacek, et al., 2013).

A study showed that on campus convenience shops are significantly poorer than traditional groceries in offering healthy items (Horacek, et al., 2013). On-campus groceries and other types of retailers proposing more healthy items like fruits, vegetables, dry fruits, and healthy snacks can change the game (Giskes et al., 2011). Gratis, which is a local retailer of daily care and health products in Turkey, opened its shop inside Medipol University in Istanbul. Focus on Medical education of mentioned university was used as an opportunity by Gratis.

Work-Integrated Learning Through On-Campus Retailing

Starbucks which is employing more than 100000 just in US, and 240000 globally, mainly not focused on graduates and tries to motivate staff for more practical skills improvement (Walsh, 2014). The potential of retailing for university graduates to be considered not rich of practical experience and skills by many retailers is an important reality (Truman, Mason, &Venter, 2017). Many students who come from universities have been so academically focused that they tend to lack the soft skills and real-world experiences (Sattler & Peters 2013). Seems like even tradition solutions (internship, group projects, site visits etc.) for improving practical skills of university students are being not enough.

Work-integrated learning is a term proposed and defined by Flinders University in Australia in 1996 (Orrell, 2004). Later on, Council of Higher Education of New Zealand also applied this approach. Study made in South Africa proposed on-campus retailing as a tool for work-integrated learning (Truman, Mason, & Venter, 2017).

Also, on-campus creates entrepreneurship opportunities for students. For some undergraduates, the first test of running a business happens right on campus (Di Meglio, 2007). University of Macau motivated students with a project to own businesses on-campus and results were prodigious. Souvenir shop, fresh fruit juice shop, snack shop and bicycle maintenance workshops owned by students reached success within campus (University of Macau, 2015). Another project was done by African Leadership Academy even before, back to 2009 and Chani's Café opened at ALA campus became a nationwide coffee shop brand (African Leadership Academy, 2009).

Students as Consumers and/or Campus as Marketplace

University students annual market estimated to be around 200 to 300 billion USD worldwide (Morrison, 2004; Berns, 2014). 40% of this money estimated to go for fashion (Berns, 2014). And it is not just fashion, but computers, Smartphones etc. It is estimated that between 64 percent and 85 percent of student funds are allocated to nonessentials. Another important fact to consider is that University students' influence on additional purchase by others estimated at up to half trillion USD (Morrison, 2004).

In 2014 Starbucks had more than 300 shops on-campus just in the US according to Bloomberg (Walsh, 2014), which was just less than 100 ten years ago (Crane, 2004). A study made in Canada found out almost every university in the country (95 percent) having retail outlets inside campus (Hammond, et al., 2005). In the mentioned study, the openness of universities for tobacco marketing resulted to be surprisingly high.

Target, Wal-Mart and Best Buy were among brands testing themselves within campus (Kumar, 2016). Amazon proposing special offers for students with Amazon Prime and day by day adding new locations for pick-up near universities see this market also attractive (Howland, 2016).

All mentioned above facts gives an important insight regarding how university campuses can be vital platform for businesses. From the other side it is reality that online retailers are always creating challenge for on-campus retailers. A study proved that this threat exists even for the purchase of items like textbooks (Foucault & Scheufele, 2002).

Cash Generation Point for Universities

If the university student is so big consumer, why not to keep his/her money inside the campus then? The average freshman plans to spend $1,200 primarily on electronics. Parents and students will spend $7.5 billion on electronics, $8.8 billion on textbooks, $3.2 billion on clothing and accessories, $2.6 billion on dorm or apartment furnishings, $2.1 billion on school supplies, and $1.5 billion on shoes. The average college student will spend $600 of his or her own money on back-to-college merchandise (Crane, 2004). And this numbers are a bit old, with high probability of increase. An important breakthrough approach brought to campuses by University of Pennsylvania became success story. Grocery story generated annually 8000 USD per m2 and rent prices topped from 80 to 220 USD per m2 after UPenn owning the property (Crane, 2004).

The university campuses are also business hotspots for merchandising. University-student affiliation has emotional aspect. Students all over the world are furnishing their houses and enriching their wardrobes with university branded merchandise (Berns, 2014). Middle East Technical University (ODTÜ) in Ankara, Turkey, after success on-campus and online with their OTDUDEN.COM acquired the store in the city center in 2017 summer and turned it to ODTÜDEN book café and shop (ODTU, 2017). University of Western Ontario redesigned their university shop in partnership with BMF Retail and brought very special concept. In US, college stores are seen as one of trendsetters at teen fashion (Berns, 2014).

Shift From University to Ecosystem

It is reality that "university building" or "university campus" is not one type premise all over the world. From Western Europe to US, from Far East to Africa the formats and designs are changing. Also, the population of university and the history are the factors shaping how the campus was shaped. For instance, at post-communist countries universities supposed to be close to the city center and as solid buildings. Instead, there are some cities like Lund in Sweden and Leuven in Belgium which are so-called university cities. Almost everyone in the city is affiliated with the university.

For large universities especially in US, to create a total ecosystem rather than university campus seems to be an important step. As a reason here, safety stands first. UPenn throughout 10 years opening 40 new businesses within campus and even large shopping mall called University Square revolutionized approach to the campus. Omar Blaik, senior vice president for Facilities and Real Estate Services at Penn mentions about engaging in urban renewal in its pure sense, recreating a neighborhood of local shops and homes and also seeing retailing as an important tool in this process (Crane, 2004). Now we see the same approach obtained by University of Illinois at Chicago, Yale University etc. This approach needed to grow, especially for rural universities which lack attractions around. Students staying on-campus at rural universities are creating close bond whit each other, but still suffering from finding retail outlets fulfilling their needs accordingly (Limanond, Butsingkorn, & Chermkhunthod, 2011).

CASE BACKGROUND

EPOKA University campus is located in a peripheral area of Tirana/Albania far from the city center and nearby the Tirana International Airport. Part of the administrative staff of the university (e.g. staff for maintenance, cleaning, etc.) are villagers with low income but they are also local farmers that produce in their small land small amounts of fruits, vegetables, eggs, dairy products etc., generally for personal usage but also something for selling informally. Given their low income, and the unemployment of other farmers in the surroundings, the university has planned to open a social business (an organic shop) that will collect the products from the farmers and will resell to academicians or other administrative staff and students that want to use organic products. Thus, the social impact is to increase the employment of the area by stimulating villagers to be entrepreneurs and probably to enlarge their production by employing others (i.e. economic impact). Another benefit is to increase the income of the villagers already employed as blue-collars in the university. In this way, the university, besides of being an incubator for developing social businesses and enriching the on-campus retail activity, becomes also a catalyzer of employment and talent engagement given that unemployment and brain drain is high in Albania (Riolli, Hysa, and Marku, 2016). Besides the economic impact there is also a social impact because, the planned social business will engage youth from the area or from the category of students (selected for example from university students' clubs). This contributes to motivate and energize the community. Finally, since the present social business will deal mainly with fruits, vegetables, and dairy, then also consumers' health and environment will benefit. Since the current value proposition of an existing service provider is not exclusively based on the organic food, consumers' engagement will be higher when they will see that the campus in which they live daily is founding a care-giving retail activity, sensitive to health, well-being, and environment.

According to Hysa et al., 2018, the social business model, given its characteristics, it is by default a sustainable business. The present case is about a social business and a sustainable one because respects the triple bottom line approach (Elkington 1997, 2008). So, it has several impacts: economic, because of increasing local employment and becoming financially self-sustainable (respecting the *dividend distribution constraint*); social, because of engaging community and talents; ecological, because of respecting environment; health, because of contributing to consumers' well-being by offering organic food.

From Value Proposition to Service-Dominant Logic

The first building block of Social Business Canvas in accordance with the Graduate School of Business at Stanford University is the *value proposition*. Besides the helpful design the business school provides, value proposition cannot represent the holistic nature of value itself. Therefore, the authors' belief is that Service-Dominant Logic and its evolution might be supportive to integrate value proposition with other types of value for building-up the "value puzzle".

Service-Dominant Logic has its starting point in 1994 with a study on resources (Constantin and Lusch, 1994; Lusch, 2006). S-D Logic developed through the collaborative work of other scholars and has been co-created thus not being limited to a single paper written in 2004 by Lusch and Vargo (Vargo and Lusch, 2004; Lusch and Vargo, 2011), but is a new logic that is not yet finalized and is opened to the co-creation by work of others too (Gumesson et. al., 2010). Gumesson et. al., 2010, evaluate S-D Logic as an evolution due to new conditions and not a revolution. Even though they are the initiators of S-D Logic, Vargo and Lusch do not claim to (as they call it) "own" this logic. On the other hand, they do encourage other scholars also to contribute on the topic and they are opened to critics as well in order to make improvement when needed (Vargo and Lusch, 2007). S-D Logic is not static and the foundational premises which firstly were only eight by time added thus supporting the idea that S-D Logic is open to enrichment (Lusch, 2006). Rather than logic, this is a management philosophy and a new mindset (Lusch and Vargo, 2008), which states the importance of value-co-creation thus leaving apart the old view on producer and consumer as apart from each other (Spohrer et. al., 2008) and has implications in social as well as economic exchange (Gumesson et. al., 2010). From the S-D Logic perspective, the product is meaningless if we forget the reason for which it has been produced and by whom and how. Consequently, the product becomes just a transition point (a bridge) between service and service. The "first" service refers to the work of the labor force that produced the product (in co-production with suppliers, customers, technology, etc.); the "second" service refers to the product utility (i.e. service) with regards to the user.

S-D Logic view is based on specialized skills and knowledge as operant resources that provide competitive advantage and involving the customer as a co-producer. Further the scholars who proposed it made a unique contribution by the distinction between operan*d* resources (typically physical e.g., machinery, raw materials; those on which an operation or act is performed) and operan*t* resources (typically human e.g., the skills and knowledge of individual employees those that act on other resources) (Day et al., 2004). According to S-D Logic, the co-creation and operan*t* resources lay in the core of the new view (Lusch, 2006) which is backed also by the reality. By defining operan*t* and operan*d* resources, S-D Logic gives to the customer a new role. In S-D Logic customers are a vital part of the exchange process They are consider among operan*t* since they are value co-creators. Operan*t* and operan*d* resources are defined by Vargo and Lusch as follows:

Operand resources; resources on which acts are performed and are primarily tangible and static. Operant resources; resources that produce effects and are often intangible and dynamic. (Lusch, 2007; Lusch et. al., 2007).

Innovative collaboration is an opportunity to increase competitive advantage and information technology facilitates this process. In addition, gaining competitive advantage is closely related to considering and treating employees as operan*t* resources (Lusch et. al., 2007). Value co-creation which is among the pillars of S-D logic is an interactive concept (Lusch and Vargo, 2006). Value is co-created all over the network of the organization including customers (Lusch, 2007). According to S-D Logic value is created only through the consumption or use, which is measured by the value-in-context (Akaka and Parry, 2018). Without use or consumption, it would be meaningless to talk about co-creation of value given that one of the foundational premises is that goods are the service provider mechanism. Consequently, the co-creation of value happens only when the proposed value considers the context in which the value will be used. If the proposed value is a matter of provider, and the value-in-context a matter of user, the co-creation is a matter of both that connects value proposition and value-in-use. Another attribute of co-creation is co-production (Lusch and Vargo, 2006). Businesses only can make a value proposition. That is not enough for value co-creation. If the customer accepts the value proposition then the co-creation process takes place (Lusch and Vargo, 2008). In S-D Logic customers are considered to be as "co-creators of value". Co-produced marketing is going to be the opportunity to improve marketing programs, further improve financial performance, and serve better to shareholders (Lusch and Vargo, 2009). Lastly, knowledge altogether with collaboration are essential for businesses to be able to compete through service (Lusch et. al., 2007).

After the theoretical background of the first building block of canvas model (i.e. value proposition), here we define the kind of the problem we are seeking to solve. On the other hand, the value delivered to payers and funders is considered. First, the value proposition of this social business is providing organic food for EPOKA University staff and students. At EPOKA University (www.EPOKA.edu.al) there are plenty of employees from the local area who are cultivating food crops and producing dairy products for personal need, and for resale to other individuals. Fruits, vegetables, eggs, milk, cheese, and chicken are among the products produced by them. On the other hand, given the intensity of the workload for EPOKA staff, it is estimated that they will welcome an initiative that will provide some valuable time to spend either on research or with their families, saving so the time of going into the market. Another valuable element is that all products will be organic, and intellectuals are sensitive to this topic, especially in Albania; they want to have good products for themselves and their families, especially kids.

Providing a market place to the local farmers to sell their products is the main part of the value proposition. In this context it is estimated that *White & Blue*[2] social business will enhance the welfare of the residents, where some of them are already working at EPOKA University. To summarize:

- Providing organic food for staff and a marketplace for local residents.
- Enhance the awareness on nutrition for students altogether with offering an interesting experience for them.
- Benefits are to the staff that can save time and gain the possibility to buy organic fruits, vegetables, and dairy products.
- Benefits are also to the sellers who access a new marketplace to sell their products, thus gaining financial benefits.

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- Another benefit of this social business initiative is the academic contribution to the literature given that it is considered a pioneering practice within a university (i.e. on-campus retailing operated through a social business).
- Thus, it is assumed to be financially, socially, economically, and culturally sustainable.

In this context, and according to S-D logic, the value is not something delivered from one actor to another. Instead, the value is co-created throughout all the supply chain. For instance, the consumer will define a list of preferred products which will be ordered by the shop to the farmer. So, the famer will put into practice the operan*t* resources (skills and technology) to cultivate and work upon operan*d* resources (soil, milk, etc.). For example, if most of consumers like more the cheese than milk, the shop will deliver the information to the farmer to transform milk (that in this case becomes the raw material or the operan*d* resource) into cheese (through operan*t* resources or skills and technology).

The value proposition is not unidirectional but involves several actors at the same time. Thus, the proposition becomes co-creation after analyzing the value-in-context or value-in-use (Vargo, Maglio, and Akaka, 2008). The value-in-context it is like the social need that any social business must identify and satisfy. In other words, every actor (e.g. social business) must know how the other actor (e.g. consumer or community) will benefit about what he is going to receive. Without this preliminary analysis of value-in-context the customers engagement is not possible. The value proposition is the potential solution for the social need. Once it is accepted by the other parties/actors, these actors start their value propositions as a feedback to improve what has been already offered to them. This feedback loop value, or the value-in-exchange process of multilateral value propositions, becomes value co-creation (Lusch and Vargo, 2008). When the actors, despite their propositions, are directly involved to produce and materialize the value, then the value becomes value co-production (Lusch and Vargo, 2006).

As an illustration, *White & Blue* is aimed to be an organic shop within EPOKA University. The governing body of the university will show the business plan to some of the technical staff that are already working within the university and cultivate some products in their small lands; in other words, to the community of suppliers. Afterwards, the business plan needs to be shown to the potential customers, completing a kind of market research. Both suppliers (local farmers) and consumers (university staff and students) will propose their own ideas, preferences, limits, potentials, and feasibility. This is necessary for establishing a correct match between supply and demand starting from reciprocal social needs. For instance, for local farmers that are already employed at university as technical staff there is the problem of very low income; for other local farmers (potential suppliers) that are unemployed there is the problem of unemployment. To both categories it is associated an economic problem. Instead, for the consumers, there is the problem of asymmetric information present in the Albanian market regarding the food quality and certification (i.e. a problem related with correct nutrition and health). To diagnose these problems, aiming the value co-creation, the focus must be firstly on value-in-context or the social need that the social business must identify and satisfy. The many-to-many relationships and interactions between all these actors define the flows of several and reciprocal value propositions (Gummesson, 2008). The synergy of the overall proposed/accepted value makes up the value co-creation.

In accordance with the above example and the theory explained, the S-D Logic and especially the concept of "value" developed by its scholars, is a further support for designing effective social businesses inside and outside universities.

Customer Segments

Individuals who are estimated to buy and to benefit from this social business are EPOKA University staff and students. Regarding students, given that they are not the daily shoppers in their families, they should be considered as "special customers". In this context, there must be an adaptation such as to make the packaging interesting or to promote the idea of "buying for donation". This is an *ad hoc* customer engagement strategy that is designed starting the analysis from the value-in-context. However, it is clear to us that these specific issues have to be addressed more specifically considering also the space that legal part allows for this kind of activity.

In order to define better the customers' segments this study gets the support from the work of Kotler and Armstrong (2016). Table 1 indicates the segmentation variables with respective examples. The authors define segmentation as: *"Dividing a market into smaller segments of buyers with distinct needs, characteristics, or behaviors that might require separate marketing strategies or mixes"* (Kotler and Armstrong, 2016, p. 222).

Considering the potential customers within the borders of the University, customer segmentation such the one below could be considered:

Geographic Segmentation

- Customers living outside the university campus (full time/part-time academic/administrative staff, students)
- Customers living within the university campus (Dormitory students)

Demographic Segmentation

- **Full Time Staff:** Academic and administrative staff who works full time in the university. After work they are not likely willing to go for shopping; that's why the White & Blue shop serves as a substitute.
- **Part Time Staff:** Academic staff who serves part-time. They work in other institutions. Mainly they have their courses in the late afternoon or on Saturday.
- **Non-EPOKA Staff:** The employees of firms outsourced by EPOKA University to conduct some services such as catering, cleaning, transportation, security. Given job specifications, they are individuals who have relatively a lower income compared to EPOKA University staff.

Table 1. Segmentation variables

Segmentation Variable	Examples
Geographic	Ex: region where they live
Demographic	Ex: occupation
Psychographic	Ex: social class
Behavioral	Ex: occasions, user status

Source: Kotler and Armstrong, 2016, p. 223

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- **Married and Bachelor Individuals:** Considering different needs of individuals such segmentation based on marital status can be considered too. Bachelor individuals consume products on their behalf or even their roommates whereas married people buy the products for their families. Especially, married couples that have children are more concerned about healthy foods.

Psychographic Segmentation

- **White Collars:** Customers who are considered to have a job grounded more on the knowledge than physical strength (i.e. academic staff, administrative staff).
- **Blue Collars:** Customers who are considered to have a job grounded more on the physical strength (i.e. gardener, cleaning staff, technical staff)

Behavioral Segmentation

- **Loyal Customers:** Those customers who are going to make frequent purchases, despite the product amount and type.
- **Casual Customers:** Customers who are making purchases for different purposes and rarely. For instance, students would like to make a purchase of a package of products to give for charity to the house of orphans of house of elder people.

Macro Environment

Another crucial block of this model is the environment. The main barrier is the legislation. This is a general challenge for social business all over the world. Given that Social Business is relatively a new business model, in Albania a dedicated body of legislation is missing as well for this type of business, qualifying it as a limited liability company without *ad hoc* regulations. In this concept in its inception this social business initiative must deal with certification of the products, and other bureaucratic barriers.

Social changes are also crucial in the success of this social business. The attitude of Albanian students toward the fact of buying something in school, in front of their peers and sending home, will affect the whole approach towards them. As mentioned above, new ways are needed to attract their attention.

Technological capabilities on the other hand affect the distribution chain. When foods arrive is important to preserve them. A refrigerator with a good quality is essential to keep the products and protect them. Monitoring the process and control all data related to the process is also an important aspect of the success. Therefore, managing the data and monitoring continuously requires some technological investments.

Competitors

In order to establish the relationship with any potential competitor, for this section, the study takes advantage of Micahel Porter's work (1979) on the forces that affect the competitiveness within one industry, as it is shown in Figure 1. Since social business is relatively a very new field in Albania, we do estimate that Porters' work on evaluation of the competitors would be a valuable initiation point. Therefore, the following information is provided.

Figure 1. Porter's five forces
Source: Based on Porter, 1979: p. 100
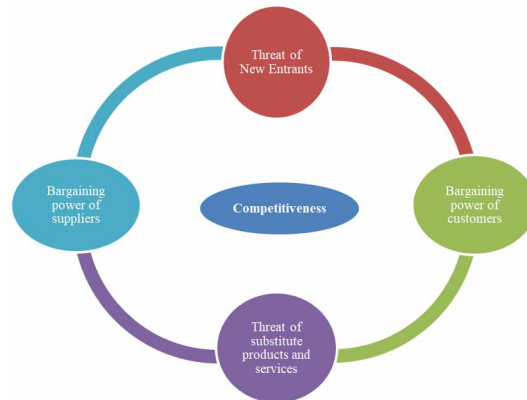
Already within EPOKA University, some of the employees (e.g. technical staff that are also local farmers) are carrying out these activities. In this perspective the main competition to this social business will derive from individuals who will still be selling informally within the university. Another potential competitor, beside local markets and places situated nearby the staff̂ homes there are also sellers during the road towards Tirana International Airport who are selling fruits and vegetables. For instance, on the road to Tirana there are a limited number of sellers who sell vegetables and watermelon. On the other hand, on the road towards airport which is nearby EPOKA University, there are sellers selling date fruit, apples, pomegranate etc.

Since the social business will be operated by another existing business inside the campus, which consider this activity a strategic diversification, then there is no threat of new entrants like there is no threat of substitute products. The current service provider of food is a strategic business unit (SBU) inside a bigger holding that includes also EPOKA University. Thus, although EPOKA and Bereqet™ are two different companies (one providing education and the other food and catering services), still they are part of the same holding which eliminates on-campus competition by outsourcing to other companies.

The bargaining power of suppliers is relatively high because they will cultivate on demand raw food. However, their supply depends from the demand of university staff and students that posses a high bargaining power as customers. The position of social business here is that of mediator, keeping the balance of power between consumers (staff and students) and suppliers (local farmers).

Partners

Since this social business initiative is being held within EPOKA University by staff and students of this university, the main partner is the university itself and the newly established Yunus Center on Social Business and Sustainability. Partners who will make the business function are also students who will assist daily activities via a new Student Club on Social Business and university staff who will oversee this initiative. Moreover, a valuable partner is Yunus Social Business Balkans that will assist with consulting on several topics (for example, legal issues). Other partners are the Government and some agriculture associations.

Activities

In order to address this building block, we contemplate as appropriate to consider the well-known value chain framework provided by Porter (1985). The value chain consisting of primary and support activities, as shown in Figure 2, is going to be among the main frames to define the activities of this social business.

The focus of this research goes beyond strategic management; hence, information related with support activities of Porter's value chain are irrelevant for this study. Instead, some insights regarding *primary activities* are disclosed as follows.

Inbound logistics: main activities here are related with the storage and transportation of raw food (e.g. fruits and vegetables) and minor processed food (e.g. organic butter, cheese, etc.). The transportation has two possible options: a) to be performed by the local farmers themselves since the quantity of supplies is not huge (for example, they may do it individually with tricycle, or create an association of farmers and do it through a mini-van); b) it can be performed by Bereqet™ (the existing on-campus food provider).

Operations: the transformation of raw materials into finished goods, may involve Bereqet™ in typical operations of snack-bar or restaurant. They already possess the necessary human resources and technology; what is necessary here, is to provide a new space for this gamma of organic products.

Outbound logistics: since the food will be served on-campus there is no need to further distribute it elsewhere. The only thing to ensure is the appropriate storage.

Regarding marketing and sales, next paragraph offers more details.

Sales and Marketing Strategy

On this block, we have to define three critical issues for making this social business functioning properly.

- *Establish a marketing strategy* just as in traditional businesses (Analysis + Segmentation, Targeting, Positioning + 4P – Marketing Mix).

In this section we are going to consider the widely known marketing mix. Furthermore, the frame proposed by Khalil and Hussain (2014) will be considered as well. Thus, the product has been seen in the context of the social case. Price on the other hand, is considered to be compatible with sufficiency. Later on, equivalent to the place component, being suitable was introduced whereas simplicity has been defined as the forth component, similar to the promotional mix.

- *Define Brand outlines and branding issues* (Brand Management)

Figure 2. Michael`s porter value chain
Source: Porter, 1985, p. 37
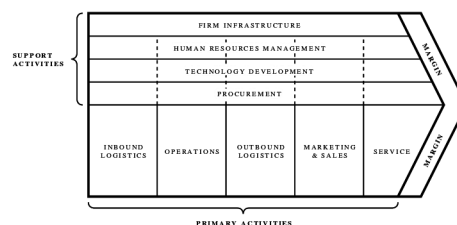
The name "White & Blue" of this social business has been defined not only following the matching of blue and white collars but also it has been chosen due to the blue and white colors that are specified in the brand book of the university.

- *Selling strategy*

All the three points are subject to a further detailed study. For instance, we are aware on some parts of the marketing strategy since we have made some analysis. We are aware on the segments and the target. We must define the position of the brand. What does White & Blue stands for? Furthermore, we should define the pricing strategy. We already are aware to some extension on the distribution strategy but there are also the promotional activities to be set. Brand management is crucial to. We need to define how this brand will be managed. A new born brand unless it is managed can be successful. Lastly the selling activities must be defined. Who will sell and in what time? During the sales process how are the activities carried out? There are many questions that arise in this section that are subject to a detailed analysis as soon as the legal barriers are over.

In order to fulfill the afore-mentioned tasks we will take assistance from Customer-Based Brand Equity and Brand Positioning as provided in the work of Keller (2013: p. 67) *Strategic Brand Management: Building, Measuring, and Managing Brand Equity*. The author provides information on how to operate while managing brand elements (i.e. logo, name) and brand equity (i.e. awareness, image).

Cost Drivers and Revenues

The cost drivers for this business are the cost of products bought from the sellers altogether with other administrative expenses. Furthermore, there are some additional costs as stated above, to initiate the social business, which are not in big amounts and do not require consequently high financial capital. Regarding the revenues, the main revenue stream is the selling of the products. Further details are missing because irrelevant for our scientific purposes, though very relevant for starting the business.

CONCLUSION AND FURTHER DIRECTIONS

This case shows clearly that social business themes can be extended by comprising universities and new academic concepts. Planning of this social business and its execution will have important implications to the literature on this topic and on-campus retailing. Additionally, it will affect the perception of social business in general due to the close partnership with universities since it is going to be among the pioneering cases.

This study is only the starting of a series. Once the social business will start its activity other works will follow in order to present a clear picture. Moreover, other researchers are estimated to contribute on the topic in the future. Social business should be considered also from other perspectives by different scholars. Since both S-D Logic and social business are being considered together for the first time in this study, there is a space for scholars to include also empirical works on the topic.

The present case study is strictly linked with the Yunus Social Business because of the human problems that aims to overcome. It aims to overcome poverty in the local area and increase employment. It

overcomes a social problem such as that of immigrations, by engaging talents and energizing their ideas. It overcomes a health issue, such as obesity and malnutrition, by providing organic products with an affordable price. Finally, it overcomes also an environmental problem of the local area because of land deterioration and non-reclamation; by creating a guaranteed market of organic products, the *White & Blue* shop, pushes local farmers to regenerate their lands and make them productive. Thus, farmers know that they will certainly sell what they will cultivate and produce. Therefore, the returns will pay back the investment and will push farmers to make soil fertile. Finally, this case respects the Yunus' definition on social business and its seven principles. *White & Blue* shop is a social business because aims to satisfy the social needs mentioned above in a self-sustainable financial way, without distributing any dividend.

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ENDNOTES

[1] The Social Business Canvas can be found at: https://sehub.stanford.edu/sites/default/files/Social%20 Business%20Model%20Canvas_1.pdf.

[2] This is the hypothetical name of the shop/social business. The brand name logic is explained in more details in the following paragraphs.

Chapter 14
Relational Proximity With Customers in the Retail Industry

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ABSTRACT

This chapter uses a theoretical background to identify and explain a new proximity concept in retail sector. In particular, adopting a marketing and management approach, an innovative type of "proximity" is presented, explaining a set of numerous elements and relationships that could link retailer, customer, and territory: "the relational proximity." The factors useful to describe the roots of "relational proximity" between retailer and customer are presented and identified in a specific case study. The new concept of relational proximity represents the originality of this study. It explains the mood coming out from the integration between the retail value offering and its contextualization with environment, society, and contemporaneity. Following this logic, the retailers in the future will focus their competitive advantage working with the customers, building day by day their relational proximity.

INTRODUCTION

The change in consumption, the retailer' evolution and the rise of new technologies generate the need to study new marketing and management approaches, especially in retailer-customer relationships. In fact, various authors are deepening this topic by using different views and presenting works with general perspectives on the relationship among retail, society and territory (McGee and Peterson, 2000; Megicks, 2001; Parker et al., 2007; Megicks and Warnaby, 2008).

Among these studies, relationships, ties, links and – *in general* – closeness between individuals and organizations are identified within proximity concepts.

The organisational, geographical, institutional, cultural, cognitive, technological, psychological and social proximity are different perspectives on the same relational connection between two or more subjects (Huber, 2012; Ensign et al., 2014; Shi and Zhu, 2018; Hegde and Tumlinson, 2014; Cassi and Plunket, 2013).

In retail, practical and theoretical approaches are at most considering the concept of proximity as the geographical distance between the shop and the customer (Gilly and Torre, 1998; Gallaud and Torre, 2004). For instance, neighbourhood shops are identified as 'proximity shops' because of the distance between residential houses and the retailer. As per literature, when a retailer is in condition of 'proximity', the relationships and the chances to satisfy the customer increase because of more contact opportunities with different target around the area of influence of the shop.

However, customers – *with their new needs* – are searching for new categories of value, generating new concept of the proximity that involves much more psychological and relational meanings.

Therefore, research about geographical proximity should not only be about physical closeness between individuals, but also about the strength of ties between them in a specific place (local relationship), and the strength of the links between individual's indifferent areas (global relationship).

This study, using a marketing and management approach, aims to identify a new proximity concept in retail sector, explaining a set of elements that could link retailer, customer and the whole environment: the relational proximity. This work, presents first the literature about the definition of proximity in several fields, second a focus on the concept of proximity in retail sector. After, eight factors characterising the latent concept of proximity are explicated and contextualized within a specific case study (Coop. fi – Italy). Finally, conclusions and future trends in research are presented.

BACKGROUND

The Concept of Proximity From Different Perspectives

The literature contributions underline that the proximity concept is analysed by different perspectives. Among the various research streams, the *geographical proximity* has a relevant role: it means the space or physical proximity between two or more subjects. It maybe the absolute distance between two actors or the subjective perspective of each operator. Small distances obviously facilitate interactions and strengthen relationships by promoting the transfer of knowledge and innovations (Gilly and Torre, 2000). In terms of social links and knowledge generation, geographical proximity is a necessary condition for effective knowledge-sharing, particularly in the case of tacit knowledge-intensive activities, such as research and development activities. In the case of codified knowledge, geographical proximity is not always a prerequisite (Maskell, 1998; Gertler, 2001; Koschatzky, 2000); at the same time activities characterised by a high cultural and geographic distance need to involve a high degree of codified knowledge. Some authors propose a concept of temporary geographical proximity (Gallaud and Torre, 2004; Hyypiä and Kautonen, 2005; Torre and Rallet, 2005). This concept implies that actors don't need to be in constant geographical proximity but may have sufficient short meetings to build other forms of proximity - *such as organisational* - that can help a collaboration even over large distances in the long

term. Geographical proximity has been studied for the purposes of dissemination of knowledge and skills within a network of relationships.

However, about proximity concept two important issues emerge from empirical studies: first, it has been shown that networks of knowledge between individuals who are not in geographic proximity can still affect the innovation process; second, the most recent literature in various scientific fields focuses on other types of proximity in order to consider them in an integrated way:

1. Cultural proximity (Koschatzky, 1998; Gill and Butler, 2003; Huber, 2012)
2. Organisational proximity (Monge et al., 1985; Schamp et al., 2004; Orlemans and Meeus, 2005; Torre and Rallet, 2005; Ensign et al., 2014)
3. Institutional proximity (Kirat and Lung, 1999; Hofstede, 2010; Shi and Zhu, 2018)
4. Social proximity (Granovetter, 1993; Bradshaw, 2001; Hegde and Tumlinson, 2014)
5. Technological proximity (Greunz, 2003; Schamp et al., 2004; Cohen and Levinthall, 1990; Cassi and Plunket, 2013)
6. Cognitive proximity (Nooteboom, 1999; Wuyts et al., 2005)

Research about *cultural proximity* take place on two levels. The first level of analysis relates to cultural differences between nations and peoples: generally, the organisations within the same territories share the same culture, and for this reason could be easier to transfer knowledge. The second level of analysis concerns the different organisational cultures existing among the players working together. The degree of cultural proximity is very similar to that of organisational proximity because again the closeness of culture facilitates cooperation without the complicated process of explicitly coding ideas. Geographical and cultural proximity reduce uncertainty in the transmission of information by facilitating access to input for the creation of innovations (Koschatzky, 1998; Landry et al., 2005).

Oerlemans and Meeus (2005) define *organisational proximity* as the set of actors that are part of the same network of relationships; Torre and Rallet (2005), on the other hand, believe that organisational proximity is the set of operators whose relationships are supported by a system of rules or laws, or customs and routines of behaviour. Schamp et al. (2004) define organisational proximity as the relationships of employees in the same company who know and share procedures and business rules and Ensign et al. (2014) as "the extent to which companies share organisational arrangements, such as hierarchy, routine and rules". Monge et al. (1985) define organisational proximity as the probability that two or more individuals may be in the same location with the opportunity to communicate face to face. According to these authors, organizational proximity assumes a variety of shapes because the transforming of rules, of organizational structures and roles within the companies affect its perception. At the same time, this proximity is affected by variability (variety during the time).

The concept of *institutional proximity* is based on the similarities of institutional schemes (laws, accounting standards, business practices), for instance between two or more countries. Institutional proximity affects the proximity between organisations; having the same regulatory scheme and the same rules supports the transfer of knowledge between individuals. Institutions and culture are strongly related (Shi and Zhu, 2018). Hofstede (2010) argues that culture determines the institutions that, in turn, strengthen the existing culture.

Social proximity is often referred to a relational closeness, and concerns all those subjects that belong to the same pattern of relationships. This dimension of proximity is very important because relations

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are the main vehicles for the transfer of knowledge and information. To evaluate the social closeness between two or more subjects the strength of links needs to be considered more than the number of relationships that each holds (Granovetter, 1993; Bradshaw 2001). In particular, there are three dimensions to be analysed to evaluate relational proximity between parties:

- The level of private and professional mutual knowledge;
- Emotional closeness in personal satisfaction and problems;
- Personal engagement in an emergency situations of third parties.

The presence of each of these elements determines the strength of links between the parties and thus allows to measure social proximity.

This branch of research is followed by other studies on psychological proximity that focuses on the degree of psychological closeness perceived by a person (Latané and Werner, 1978). Further, other studies underline how social proximity effects on the choice of business partners (Hegde and Tumlinson, 2014).

Technological proximity is based on the sharing of technological knowledge, and in literature it is often called 'virtual knowledge' (Schamp et al., 2004; Cassi and Plunket, 2013). In particular, sharing virtual knowledge using virtual platforms may facilitate both learning new skills, and the anticipation of technological developments (Tremblay et al., 2003). This type of proximity is the ability of an enterprise to employ an innovation of processes and products. It relates to the ability of a company to grasp the value of an external idea and exploit it for commercial purposes (Cohen and Levinthal, 1990).

Nooteboom (1999) developed the cognitive proximity concept that represents the similarity with which individuals perceive, interpret, understand and evaluate opportunities and external events (Wuyts et al., 2005). It can be considered a dimension of organisational proximity. In fact, the sharing of roles and customs facilitates the knowledge transfer process (Ensign et al, 2014). There are four dimensions to evaluate cognitive proximity: the use of a common technical language; sharing thinking about product and technology development; a common thought about problem solving and a technical background.

The Proximity Concept in the Retail Studies

In research about the effects of retail expansion, many authors have used the concept of proximity to study retailers' format and formulas. It is common to consider a small shop, simply, a 'proximity shop' (or neighbourhood shops) considering the distance between the shop and the houses of potential customers. It is also common to think that customers prefer to purchase close to their home, but as the literature and practice demonstrate, this is not always true and customers choose the retailers value offerings looking at a system of elements and often, preferred opportunities and shops (for e.g. shopping malls) are far from their homes. As explained below, to maximise the searched value, consumers are willing to visit retailers further away if they offer better opportunities in terms of convenience or entertainment.

Searching for shopping opportunities far from home has been attributed to dissatisfaction with the assortment of local small retailers (Riecken and Yavas, 1988). This attitude about consumer attraction towards large-scale distribution has resulted in the loss of local custom, and the consequent decline of the neighbourhood retail concept (Lumpkin et al., 1986; Marjanen, 2000). Customer choices to visit a retailer farther away than small shop is determined by four fundamental variables: increasing income, a young age –*for example, some studies show that seniors (65 years and over) are more satisfied by local*

retailers (Miller et. al., 1998) – a good level of education (Sullivan and Savitt, 1997) and the inadequacy of local shopping facilities (Samli et al., 1983).

The concept of proximity has even been analysed from the point of view of the geographical location of neighbourhood shops in complex areas for logistics *(rural areas)*. The major difficulties of retailer localised in these areas can be seen in the impact of out shopping (Broadbridge and Calderwood, 2002), in difficulties in the supply of small independent retailer (Howe, 1992) and into financial problems related to small-scale retailer (Howe, 1992). The general trend of decline in small independent retailers has been described by UK researchers (Clarke, 2000; Baron et al., 2001), by Spanish researchers (Jones, 1994; Santos-Requejo and Gonzalez-Benito, 2000, Parker et al., 2007) and in general by researchers in the EU (Poole et al., 2002; Dobson et al., 2003; Sørensen, 2004). At the same time, however, many authors have analysed the availability of strategic opportunities for small retailers in these areas (Jussila et al., 1992; Byrom et al., 2001). There are positive effects of small independent retailers in residential areas and city centres; they have a positive influence on community cohesion (Bennison and Hines, 2003; Coca-Stefaniak et al., 2005), on the health of the districts (Rex and Blair, 2003), on the variety of choice for consumers (O'Reilly and Haines, 2004), and on the vitality of urban centres (Worthington, 1998). In a global contest, D'Andrea et al. (2006), analysed the concept of neighbourhoods, talking about the 'emotional closeness' between customer and shop, expressed as a form of competitive advantage for the small independent retailer. Miller et al. (1998) focused on the factors affecting the competitiveness of small independent retailers, describing strong bond between the level of customer service and high level of personal interaction.

THE RELATIONAL PROXIMITY CONCEPT IN RETAIL INDUSTRY

Relational Proximity as a Latent Concept

The goal of this study is to present a latent concept with the aim to express the system of elements that generate the connection between retailer and customer, going beyond the classic considerations in terms of marketing, sales, promotion and needs of satisfaction. The offering is not only represented by the retailer, but a value network emerges, when retailers and customers are together involved in generating a set of opportunities for both sides.

The evolution of markets and consumption affects retail, offering the following different directions and stimulating a multiplicity of reactions. Modern retailers are searching for new and alternative ways to manage the rising complexity in marketing and management. The latent concept of relational proximity emerges by the next discussion as the result of a systemic, synergic and contextual intervention of a multitude of stimuli that involve the customer. The stimuli are represented by direct and indirect contacts and participation between customer and retailer's value proposition; in these cases the level of customer engagement increases and the latent concept of relational proximity emerges.

The relationships in economic activities are elements that generate competitive advantage, and the prerequisite for the exchange of relationship is the opportunity to make contact – not necessarily physical contact. That suggests the existence of a proximity concept that goes beyond physical distance, to an emotional, psychological and social nature that includes the different expressions and intensities of business-client relationships.

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The relational aspect of retail proximity has an affinity with the concept of resource integration. Actors in a contest can integrate their resources when they are able to recognise the belonging to the same environment and, for this reason, they are able to stimulate the emersion of a co-created value (Vargo and Lush, 2004). This concept is useful to briefly explain that the multidimensional proximity is not created by one side, but it's an emerging concept that involves the efforts of various actors in the network with the (same) goal; to find a specific place and offering to satisfy and to find benefits (Sullivan et al., 2012). Some retail chains provide alternative projects, developing new formats with specific assortment focused on special needs working on an alternative value proposition that aims to be 'close' to the new market segment.

Each actor has a role and together they should provide a system of value, creating mutual benefits in win-win relationships. For this reason, each actor needs to generate opportunities to improve the quality of their relationships. Because the retail industry is at the centre of this network, the retailer is the first in generating the value offering. So, considering the evolution of the markets, consumption and the needs of the customers, retailer has to stimulate the customers to interact, to participate and to be involved in the value proposition.

In this scenario, a multitude of relationships emerges and different proximities are highlighted. It is possible to recognise institutional, cultural, organisational, social, technological and cognitive proximity. Therefore, within the retail industry, a multidimensional proximity (relational proximity) could emerge within a specific and 'ad hoc' strategy.

Customer satisfaction is the final step that emerges as the result of network cooperation. The retailer is one of the few actors directly close to the customer and for this reason, it is the actor that stimulates the sensation of 'proximity' for the customer, from a simple sensation of 'closeness' to the customer, to a complete integration of him within the wider network of value. Although relational proximity could emerge with particular strategies, this is not always a rule. Sometimes, it needs huge investments because the proximity depends on the ability to stimulate specific sensations of closeness between the retail-network value proposition and the customer (Wulf et al., 2001; Anderson et al., 2007; Nguyen et al., 2007). It could therefore be an approach adopted by retail chains or by independent shops.

In that scenario the customer is at the centre of each retail strategy; beyond simple customer care or the customer relationship, there is an apparent need to integrate the retail offering in a company project that stimulates the emergence of the wider value network (directly or indirectly involving the different actors, such as retailers, suppliers, territory/place and customer). Within this network, the retailer is one of the actors that integrating resources tries to satisfy the customer, generating benefit. The relationships and resource integration within the network are able to stimulate growth of the shared context from a value co-creation perspective.

Method

Because the relational proximity is considered a latent concept, this work aims at identifying the specific factors characterizing it, trying to find solution to verify the conditions that stimulate the emersion of relational proximity concept in the contexts of retail chains and independent retailers.

With the aim to find the factors that define the latent concept, the first step is the identification of the literature and the research branches that defined the specific concepts of proximity.

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Using the presented literature, with the goal to collect factors able to describe the latent concept of relational proximity, the first choice is to collect the relevant elements that support the emerging of relational proximity during the relationship experience between retailer and customer. Achieving this goal, the work includes some relevant solutions coming from different scientific disciplines in a collection of factors, considering that the context of experience for a customer is not separated by the retailer offering.

The customer experience with a store is made by psychological, sociologic, marketing, logistics and economic stimuli that generate sensations, doubts and thoughts. Of course each stimulus contributes in generating the customer-retailer contextualization that in this work is presented as a selection of relevant key elements coming from the literature, practitioners activities and collecting to represent the relational proximity. The selected factors are explained in their nature using specific literature. Further, the selected factors are identified within an empirical case study.

The Relational Proximity Factors

As stated before, relational proximity is a latent concept that expresses the multidimensional characteristics of the retail proximity concept. Each retailer could stimulate the emergence of relational proximity independently by the format, dimension, capital availability or distance from customers.

According to the previous research branches building on retail literature, it is possible to argue that a useful strategy to stimulate the emergence of relational proximity has to manage an ensemble of factors able to encourage actors to work together for shared goals within the network. In that context the principal actor could be the retailer, representing the first and the last actors in direct relationships with the customers, and relevant actors in the network. The economy and the context of actual situations encourage companies to be reactive, open, fast and flexible. So the retailer needs to follow these guidelines to stimulate the actors within the network to innovate, to cooperate, to interact and to consider the connections between customers, companies and, of course, territories. Relational proximity is identified by eight factors listed below:

1. Value co-creation (Vargo & Lush, 2004; Sullivan et al., 2012);
2. Marketing and communication investment (Ailawadi et al., 2009; Hunter et al., 2013);
3. Attention to changes in consumption (Solomon, 2010; Spaargaren et al., 2013; Clarke et al., 2006; Wrigley & Lowe, 1996);
4. Investments in customer relationships (Wulf et al., 2001; Anderson et al., 2007; Nguyen et al., 2007);
5. Specialisation within the specific retail business area (Logan, 1994; Megicks, 2001);
6. Value from past experiences (Rerup, 2005; Ghattas et al., 2014);
7. Increasing partnerships within the network;
8. Place attachment.

Value Co-Creation

Because there is a need for resource integration within the network, it seems useful to consider how that value is co-created by the different actors. If the actors share the concept of value co-creation, the involvement of different subjects will probably create many more opportunities to generate relational proximity.

This attitude represents the ability of retailers to engage the customer and stakeholders before, during and after the purchase process; the interpretation of this attitude from retailers involves aspects of value co-creation described in the literature (Sullivan et al., 2012) and it is integrated with the contributions of the 'service' approach resulting from S-D logic (Vargo and Lusch, 2004). In a scenario where consumers are always looking for new opportunities and cooperation, retailers can stimulate value co-creation logic from different points of view because the customer is now evolved, rational and informed. The customer is able to choose and participate in the generation of value proposition. This factor contributes in providing tools to develop the strategy and to build relational proximity.

Marketing and Communication Investments

Marketing and communication investments enable retailers to implement new strategies, to acquire information and, more broadly, to be in contact with the market at different levels. Scholars and practitioner deal with the relevance of investments in marketing and communication (Ailawadi et al., 2009), especially in the study of large companies and large retailers. Detecting this attitude among independent traditional retailers can be an indicator of the start of relational proximity.

Investments in marketing and communications include the use of digital tools, especially the internet and social networking sites, which favour the ability to remain in constant contact with consumers at a lower cost than other traditional instruments (Hunter et al., 2013). The relevance of such tools is even greater for the small and independent retailers: in fact, such tools require limited resources, and can be used to establish a stronger relationship with the target.

Attention to Changes in Consumption

Each actor within the network needs to be interested in change. In particular, the retailers are interested by the structure of consumption, and this has encouraged the use of new strategic and operational levers to try to meet the demand needs. For instance, the attention to the lifestyles of consumers that affect purchases has always been recommended by numerous business disciplines, including marketing (Solomon, 2010; Spaargaren et al., 2013). The emergence of a new concept of family, the consolidation of societies that in some countries are increasingly 'old', encourages some retailers to reformulate their offerings in terms of value creation. Changes of lifestyles affect consumption patterns by stimulating the emergence of new selling formats (Clarke et al., 2006; Wrigley & Lowe, 1996). From a particular perspective, it is possible to recognise this factor in retail companies when looking at the ability of companies to acquire information regarding the change of consumer behaviour, by referring to specialised companies or industry opinion leaders, for example, participation in trade fairs, and taking information from data analysis in and outside the company (e.g. sales, revenue).

Investment in Customer Relationship

If there is a customer relationship management activity within a retail company, of course it amplifies the factors in a relational proximity approach. Generally, it is possible to understand this kind of attitude by detecting the use of specific tools – the use of questionnaires for the analysis of customer satisfaction, interviews, and meetings. The presence of loyalty tools in a relationship between company, customer and network, allows to understand how much the retailer is market-driven and therefore how willing to invest

in the consumer relationship. This variable is described by multiple contribution of the literature (Wulf et al., 2001; Anderson et al., 2007; Nguyen et al., 2007) that highlight the importance in management of the business toward the customer relationships. Investment in customer relationships contributes to the generation of a competitive advantage for retailers.

Specialisation Within the Specific Retail Business Area

The market today is favouring specialisation, for independent retailers and large scale distribution, because it represent a factor of competitiveness and differentiation (Logan, 1994; Megicks, 2001). Specialisation is certainly used by enterprises of large-scale distribution – with specialised stores –in terms of assortment, layout, private label and specific knowledge. At the same time, a proactive approach to specialisation of the offering, mainly brings benefits to independent retailers and contributes to forming an innovative approach to the concept of relational proximity.

Value From Past Experience

Past experience assumes a relevant value (Rerup, 2005). This factor makes possible to identify the relationship between the contemporary management of activities and the experiences of the past not necessarily linked to previous generations. Data collection, the analysis of experiences and attention to the different generations are elements that allow the opportunity to build identity and to realise the connection between companies and customers (Ghattas et al., 2014). Also the experience of retailers with family traditions has always an effect on the experience of the new generations – positive or negative.

Increasing Partnership Within the Network

Several authors highlight the importance of networks and partnerships between companies at multiple levels (Castaldo and Mauri, 2008; Ayers and Odegaard, 2017). Large-scale distribution, for example, is the result of the aggregation and the need to think of common management and marketing policies. Independent retailers till have to work hard to implement cooperation strategies. The cooperation and coordination of various retailers and actors within a network can generate opportunities and highlight a sense of connection that is useful to transmit to the customer new signals of cooperation and new opportunities to gain value from the network. Research about independent retail development in urban and exurban areas (Parker and Byrom, 2000; Halls, Worth and Warnaby, 2003; Broadbridge and Calderwood, 2002) showed that the partnership between retailers and city government agencies creates value. A positive attitude to aggregation helps to stimulate the emergence of relational proximity.

Place Attachment

The literature has always considered the important role of independent retailers in the place development. They have a social and economic role in the community within a specific area. Although the literature is not extensive around this concept, different authors have considered the connection between retailer, customer and territory/place (Howe, 1992; Jussila et al., 1992; Miller et al., 1998; Smith and Sparks, 2000; Broadbridge and Calderwood, 2002; Byrom et al., 2001). The connection between retail offering and area is important to stimulate the relational proximity, because within this factor is it possible to

find the system of social, psychological, cultural and relational elements that can be found within each proximity concept.

Because relational proximity is a multidimensional condition that should be perceived by the actors within the retail network (with a specific focus on the customer) the retailer should manage the eight factors, giving the customer the opportunity to perceive the multidimensional proximity in this system of factors. It is then possible to provide the customer with particular stimuli that should be perceived as a sort of quality offering from the network of actors, and not necessarily from the retailer. Of course, their particular position within the network allows the retailer the opportunity to manage the system of eight factors.

From the retailer's perspective, the meaning behind each factor can be described below, explaining how each factor contributes to relational proximity.

Contextualizing the Relational Proximity in a Retail Format

Relational proximity is a latent concept, involving various perspectives and a multidisciplinary approach.

The description of an empirical case could be useful to better understand the eight factors characterising relational proximity in retail industry. Therefore, as suggested by literature, the case study is useful as an illustration and exemplification of what is described and as inspiration for the generation of new ideas in the field of retailing strategy (Gummesson, 2006).

Below, first the retail format and basic information are described, then the factors that characterize the relational proximity in this specific case are presented.

The following information was collected through a telephonic interview with the director of the store and through secondary data analysis of specialised reports and magazines.

In March 2015, Coop.fi refurbished a supermarket in Grassina[1], where there had previously been a supermarket for 25 years, by launching a new concept that foreshadowed a new "relational system", with a particular target, the elderly, who are becoming increasingly important in Italy.

It is a store of 550 square meters where it is possible to find craftsmen: butcher, baker, and greengrocer, ready to offer advice and recipes. The shop also has two corners with loose pet food and loose detergent; the corners are almost connected and are located where the layout has been reduced to allow for quick shopping. The store is in the main town centre and customers can get thereby foot or by car, although the underground parking for 25 cars is quite small. The difficulty in parking is to induce consumers to reach the store preferably by foot or by bicycle. The income of the first isochronous (5 minutes) of residents is medium high respect to the average of income in the same geographical area. The area of the supermarket is 450 square meters on one level, and forms a large and irregular horseshoe. The sections form a square, like a local traditional market.

The designers have considered the timings of two kinds of shopping when developing the layout: longer and quicker shopping, by cutting off the gondolas in middle of the layout to allow a quick entrance to the consumers. Gondolas have been lowered to 1.60 meters to allow customers to easier observe the perimeter, make access to shelves, and so the purchase of goods; the price tags are more readable; refrigerators are closed to save energy; the shopping carts are made with recycled plastic and the lights are powered by led. The parquet floor is made with stoneware and has a pleasing effect, mimicking the essence of wood and merging with the equipment and with the wooden crates containing fresh produce.

The top level opens to a room of 100 square meters; it's an area dedicated to being social, where it is possible to read a book, a newspaper or just to rest.

The assortment has been reviewed in depth to provide an acceptably sized extension: the price scale was increased and around 500 local products have been introduced.

The shelf in front of the counters has been renovated and now contains neutral products for children or natural snacks instead of only unhealthy snacks and chewing gum.

The new format also promotes private label products (especially Fiorfiore Coop) highlighting the gap in price with industrial products: there are numerous red shelves that contain private label products and industrial brand products to allow a price comparison.

This case was chosen because Coop.fi seems to include all eight factors characterising relational proximity.

For this reason, the following table (Tab.1) is proposed: it includes the eight factors presented above as primary for the definition of the new concept of proximity and, for each of them, a brief description and contextualization to the Coop.fi case.

This case shows that the 8 factors identified through the literature review can be useful to describe also empirically the new concept of relational proximity. Looking for them in a specific retail format, it is possible to understand how the retailer is building its strategy, the relevance attributed to the relationship and the social role that retail plays in the city. In the analysed case (Table 1), the goal of relational proximity seems to be achieved: in fact, surveys conducted by management show that customers sometimes "take a walk in the store" without having to buy anything, but only to greet staff or spend time within the social space.

FUTURE RESEARCH DIRECTIONS

Different opportunities come from relational proximity in terms of research because the theme could be approached by a multitude of perspectives and frameworks from socio-psychology to marketing, from management to geographical studies and law. That is true, in particular, studying the relational proximity factors and their integration. In general, the future research should be focused on marketing and management perspectives around relational proximity, considering the role of retailer's owners, human resources, suppliers and, of course, customers.

Any case, it is suggested to divide the future research perspectives following two main lines: the first is around the context of retail chains and the second one, through the context of independent retailers. The suggested main division comes from the different levels of evolution that each sector could present in terms of innovation, customer relationship management and, in general, marketing and management. The retail chains present advanced methods in terms of marketing, management and structured frameworks to generate and manage the innovation and relational proximity because the investments during the past years and the evolution of modern associated and cooperative retail. On the other side, the independent retailers present a different situation in terms of innovation and levels of relational proximity implementation. That generates opportunities to study differences and lacks to be filled in research.

In retail chain contexts, could be useful to deep new ways to customize the customer experience to stimulate the emerging of relational proximity applying marketing and technological tools that retail chains are using and developing (in terms of technology, social networks, advanced techniques in customer satisfaction or customer profiling). In particular, the research should focus the attention on the results coming from the implementation of the tools, trying to understand how the customer perceive the

Table 1. Factors defining the emergence of relational proximity

Factors	Factors in Practice
Value co-creation	Coop.fi proposed a new format entirely focused on the involvement of consumers and other actors before, during and after the purchase process. The value proposition is based on a concept of relationship that goes beyond the purchase act and exceeds the role of simple retailing. Interaction between customers and workers is encouraged.
Marketing and communication investments	Coop.fi is strongly oriented towards marketing activities: in the analytical phase (the format is based on the results of market analysis) and in the operational phase (ad hoc marketing and communication policies favoured the launch of this particular concept store); in particular, the management is always ready to accept information and advices from customers.
Attention to changes in consumption	The top management of Coop.fi states that the opening of the store was supported by market analysis showing changes in consumer lifestyles, the reduction of time available to make purchases and the need to establish long-term relationships of loyalty with the retailer. The choice of the target - the elderly - is coherent with the demographic trends in Italy, and in particular within the Grassina town centre.
Investments in customer relationships	The goal of the concept is to create daily relationships with the target customers through the management of the fresh food and the staff. In order to create an everyday purchase, the bakery department realizes 48 different bread types, directly in store. There are 23 front office staff trained to meet the needs of customers, with the aim of creating an everyday relationship of trust.
Specialisation within the specific retail business area	The retail concept is perceived as simple to understand in terms of user experience and well defined: the internal atmosphere reproduces a local and traditional market; layout and visual merchandising are consistent with the value proposition; the height of the shelves has been reduced to 1.60 meters, the assortment has been reduced and it is focused on local and private label products, the price scale has been expanded.
Value from past experiences	The main reason why Coop decided to invest in a concept in line with relational proximity is in its business story and social capital. In fact, Coop states that those who work and shop in the Cooperative know that their commitment is not to enrich an individual, but to improve conditions for members/citizens and leave a legacy that is helpful to future generations. Unicoop Florence exists since 1973 and, as were all consumer cooperatives, it was created to defend members regarding price variations and quality of products.
Increasing partnership within the network	The goal of Coop.fi is to co-create value with all the actors in the network. The strongest integration takes place with the local producers of fresh products at Km0 and with the co-packer companies of the Fiorfiore products, for the management and control of the supply chain.
Place attachment	Coop.fi underlines the strong local roots and awareness of the role that retailing plays in the development of place and the local economy: around 500 local products and goods have been introduced; the retailer promotes the fair management of relationships with local suppliers; and the entire store is oriented towards respect for the environment and sustainable development.

mix of relational proximity factors and how it is possible to better involve the customer in the process/experience of value co-creation of relational proximity in store and out of the store.

On the contrary, between the independent retailers, in general, the research assumes a more basic role and a less deepened level of study. It is possible to study the application of relational proximity factors especially in the contexts often characterized by gaps in knowledge and cultural openness, reduced availability of funds and capitals and limited availability in changing of business approach.

CONCLUSION

Proximity today represents a multidimensional concept that can express a wide range of meanings. It is possible to simulate proximity to the customer with shops characterized by different dimensions and distances to the customer, because the actual economic and social conditions (in terms of communication, technology, transport, management of time, and levels of consumption) suggest to manage new priorities by the customer side and different levels of perceptions about difficulties, contacts and relationships with the retail providers. As stated in the literature, retail proximity plays a basic role in economy for social, logistical and relational reasons. Looking at the retailer value proposition, whether far away or close to the customer, the relationship is the basis of the proximity concept.

This work explained that within the relationship concept it is possible to consider a list of factors that describe the multidimensional characteristics of the proximity perceived by the customer. The same customer is part of a network that stimulates the emergence of the different dimensions of relations. Relational proximity is not only possible through simple contact and feedback with a retailer, but this concept grows through the engagement of the customer in retail value proposition, the growth of retailers sensitiveness in terms of customer involvement in strategic decisions and with the contextualization of every retailer activity with the place in which it operates. Actors network need to be ready to express their potentiality and their own knowledge so as to integrate the customer within the network of proximity. In that way, the customer feels engaged in the retail value proposition and, of course, he has the opportunity to recognise the effective value of the proximity.

There are many implications in the relational proximity concept.

First, this concept has implications for retail chains and associated shops; in particular, in terms of marketing and management strategies, starting with the policies about customer and network relationships. To obtain cooperation and resource integration it is necessary to identify common rules and institutions between the associated shops to the chains and that constitute the roots for cooperation. This requires great effort that could make the difference between retail chains and, of course, between networks. To implement a common marketing approach within the chain, each retailer should have marketing and management perspectives shared and diffused within the chain between the associated retailers.

Second, many more difficulties could emerge for independent retailers. Each retailer has own story and, although individual shops can work day by day with customers, could be hard to find capital, resources and time to use, generating a network of relational proximity following updated tools. Of course the independent retailers have relationships (and could create formal or informal networks) within the territories in which they work, and they are able to maintain contacts with particular (and traditional) suppliers, municipalities, colleagues and customers. Going beyond the classic request of feedbacks after sales, the independents have opportunities to make real the relational proximity project for an independent retailer. Networking between shops, suppliers and cooperation with local governments could generate opportunities, although retaining independent management (e.g. Town Centre Management).

Third, there are implications for customers. This category of actor is directly involved within the network. Value co-creation and strong relationships require ready and informed customers from company and customer side. The customer should be educated to the relational proximity to recognize the elements of emersion, during the activities of each actor involvement (directly or indirectly) in the process. It is not simple to be a customer who is perceiving relational proximity. Only customers able to interact and participate will be able to understand this set of opportunities within the relationship.

Fourth, it is possible to reflect on the implications for suppliers. This particular category of actors is strongly involved within the retail offering, contributing to customer satisfaction, to connections between territory and retail offering, the identification of quality of offerings in terms of production, and in some activities able to cooperate in the identification of codes, rules, and quality protocols. In that way, the suppliers should consider the opportunities coming from the relational proximity in particular in terms of exchange of data and information, not only in terms of production but also in terms of services (delivery time, production formats of goods and services, opportunities to integrate their work with other actors involved in the process of relational proximity).

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ENDNOTE

[1] Grassina has around 8,000 inhabitants is a hamlet in Bagno a Ripoli, a municipality close to Florence.

Chapter 15
Adolescent Influence in Family Purchase Decisions

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ABSTRACT

The adolescent is considered as an active element in family purchase decisions, especially in the earliest stages of the process. However, researchers have focused their attention on purchases for adolescent use. In this chapter, the author examines adolescent influence for several products. A survey was used to collect data from several high-schools in districts of Lisbon, Setúbal, Portimão, and Beja. 2,800 questionnaires were delivered during May 2016. Adolescents were instructed to submit the questionnaires to their mothers and to return them, fully completed. 966 validated questionnaires were returned. The results point to adolescent's age, gender, product knowledge, and mother's occupational status as the relevant explanatory variables. The results also point to the relevance of considering product category as a moderating variable. The present chapter offers a contribution to companies by providing evidence of adolescent's influence in family purchase decisions. It is important that producing companies and retailer marketers focus their efforts on adolescent satisfaction.

INTRODUCTION

The family has been considered as the most relevant consumer and decision-making unit in the area of consumer behavior (Baía, 2018; Kaur & Medury; 2011, 2013; Sondhi & Basu, 2014). The study of family consumption behavior has become increasingly important in the literature, in particular the process by which family decisions are made. In this context, academics and marketers recognize the importance of deepening and continuing the study of family consumption unit (Kaur & Medury, 2013; Niemczyk, 2015).

The theme of this chapter is household consumption behavior. The domain of family consumption behavior presents some gaps, among which, the influence of adolescents is often underestimated, and even omitted, with regard to purchasing decisions in that consumption unit. In most studies of traditional families, the adolescent is considered a less relevant actor in purchasing decisions, more associated to

the purchase of products for own use, or with those products of less value to the family (Aleti, Brennan, & Parker, 2015; Beatty & Talpade, 1994; Commuri & Gentry, 2000). The adolescent also appears to be more associated with the initial phases of the purchasing decision process (Commuri & Gentry, 2000; Kaur & Medury, 2011).

The focus of the present chapter is the adolescent's influence in family purchase decisions, considering different categories of products according to the primary user whose interest is based on research on consumer behavior (Kaur & Singh, 2006). The influence of the adolescent on family buying decisions is not adequately studied in the literature on consumer behavior, noting the lack of theoretical explanation, aggravated by the descriptive nature of much research in this area (Yang et al, 2014; Kaur & Singh, 2006). The decision by adolescence (from 12 to 19 years old) refers, on the one hand, to the indication of the adolescents representing an age group with the complete cognitive development, that perceives the economic concept (Chavda et al., 2005; Kaur & Singh, 2006). On the other hand, adolescents are considered as active participants in purchasing decisions in the family, and the level of influence exerted is positively associated with their age (Aleti et al., 2015; Shergill et al, 2013).

To measure the influence of the adolescent on family purchases, only the mother's perception will be considered, which is consistent with other studies (Ahuja, 1993; Ahuja & Stinson, 1993; Ahuja & Walker, 1994; Ahuja, Capella, & Taylor, 1998; Isin & Alkibay, 2011; Kim e Lee, 1997; Mangleburg, Grewal, & Bristol, 1999).

In addition, the choice of purchase decision is related to the fact that several researchers recognize that phase as being the most relevant in the family buying decision process (Chavda et al., 2005; Shoham & Dalakas, 2003).

Given the limited research on the adolescent's influence on family buying decisions, several authors refer to the need to deepen the study of this phenomenon (Commuri & Gentry, 2000, Watne et al., 2014). In many studies, the adolescent is considered to be a less influential family member in buying decisions, and his influence efforts are more associated with products for his own use, or products for family use, but with a lower purchase value (Belch, Belch, & Ceresino, 1985; Beatty & Talpade, 1994; Commuri & Gentry, 2000). In fact, until the past century, research rarely perceived adolescents as decision making influencers within family (John, 1999; Mau, Schuhen, Steinmann, & Schramm-Klein, 2016).

The adolescent market is substantial and growing which needs marketers from producing and retailing companies to understand the adolescent purchase behavior for current sales and future brand loyalty (Niemczyk, 2015; Shahrokh & Khosravi, 2014; Srivastava, 2015; Yang, Kim, Laroche, & Lee, 2014). There is a good stream of research which has shown that adolescents play an important role in family purchase decisions varying by product, decision stage, adolescent, parental, and family characteristics (Akinyele, 2010; Aleti, Brennan, & Parker, 2015; Ali, Ravichandran, & Batra, 2013; Baía, 2018; Ishaque & Tufail, 2014; Shergill, Sekhon, & Zhao, 2013).

In order to confirm the adolescent's influence on the family context, it will be of interest for producing companies and retailer marketers to understand the dimensions that contribute to explain that influence.

Research Problem and Objectives

The research problem essentially involves an academic / theoretical dimension that this study proposes to contribute to solve and which is related to the answer to the following questions:

- What are the dimensions of the adolescent's relative influence on purchasing decisions in the family?
- What is the mother's perception about the adolescent's influence?
- Does this influence vary by product category?

Possible Research Contribution

The possible contribution of the study should be considered in two dimensions: academic / theoretical and for producing and retailing companies.

The main theoretical contribution made by the project will be the creation of a frame of reference for the study of the adolescent's influence in the purchase decisions in the family. The influence of adolescents on family buying decisions has been the subject of very limited attention (Chavda et al., 2005; Commuri & Gentry, 2000; Yang et al, 2014). This situation is even more serious when the influence of the adolescent is studied in the purchasing decision phase (Chavda et al., 2005; Kaur & Singh, 2006).

Given the importance of adolescents in the consumer market and in particular the influence they have on households, it is important for marketers in producer and retail companies to focus their efforts on satisfying this market element. If a decision is considered to be largely influenced by the adolescent, then the messages should be addressed and this member of the family. Thus, marketing professionals should generally adopt strategies that reflect the different types of family structures.

Chapter Organization

The chapter begins with the research questions definition and literature review. Then the methodology used in the present research will be characterized. The main results of the study will be presented and the research results will be discussed, as well as the main conclusions, limitations and indications for future research.

THEORETICAL BACKGROUND

The family represents the most important unit of consumption in the study of consumer behavior (Aleti et al, 2015; Shergill, Sekhon, & Zhao, 2013; Shoham & Dalakas, 2005; Sondhi & Basu, 2014). The study of family consumption behavior has become increasingly important in the literature, in particular the process by which family decisions are made. Given the specificity and complexity of the family context, academics and marketers recognize the importance of their continued study, as well as accompanying changes in family structures and composition (Aleti et al, 2015; Chaudhary & Gupta, 2012; Shahrokh & Khosravi, 2014; Watne & Winchester, 2011).

Family Purchase Decisions

Several past researchers pointed to higher levels of adolescent influence in purchases of products for their own use in traditional families (Ashraf & Khan, 2016; Kaur & Singh, 2006; Shoham & Dalakas, 2003). Furthermore, adolescents tend to develop greater attempts to influence those products that they

value the most (Kim & Lee, 1997). However, there is evidence that the adolescent's influence on family buying decisions is not adequately explained (Aleti et al, 2015; Baía, 2018; Chaudhary & Gupta, 2012, Kaur & Singh, 2006; Shergill et al, 2013).

Approaches to the Study of Adolescent´s Influence

Although there are several approaches to the study of adolescent influence in family buying decisions, it can be said that there are two main approaches that have focused attention on much of the research in this domain (Commuri & Gentry, 2000; Kaur & Singh, 2006):

- Adolescent's relative influence;
- Adolescent's consumption socialization.

The relative influence approach considers that the adolescent contributes to the family buying decisions as a result of the relationship between the adolescent and the parents (Beatty & Talpade, 1994; Mangleburg et al., 1999; Shoham & Dalakas, 2003, 2005). This relationship is conditioned by a family structure where, in general, parents have more power, with the adolescent to take a less participative role in family buying decisions (Belch et al., 1985; Beatty & Talpade, 1994; Foxman, Tansuhaj, & Ekstrom, 1989b; Shoham & Dalakas, 2003). However, there is a broad consensus on the importance of including the adolescent in the family purchasing decision process, defending their influence in the purchase of certain product categories (Belch et al., 1985; Beatty & Talpade, 1994; Commuri & Gentry, 2000; Foxman et al., 1989a; John, 1999).

The adolescent's relative influence on family buying decisions had an increased attention in literature, mainly from the 1980s forward (Belch et al., 1985; Darley & Lim, 1986; Foxman & Tansuhaj, 1988; Foxman, Tansuhaj, & Ekstrom, 1989a).

The approach to adolescent socialization has generally adopted two approaches to the study of adolescent influence on family buying decisions (Chan, 2006; John, 1999), more specifically through:

- Cognitive development, and
- Social learning.

The cognitive development approach considers that the adolescent is involved in a continuous process of consumption learning, where the acquisition of consumer competences happens as a function of cognitive changes during a development process that runs from childhood to adulthood (Moschis & Churchill, 1978, Moschis & Moore, 1979).

By contrast, the socialization of consumption by social learning seeks to explain consumer learning through the interactions that the adolescent develops with his / her socialization agents, specifically family, friends, school and the media, in different learning scenarios (Chan, 2006; Foxman et al., 1989a; Ekstrom et al., 1987; Mangleburg et al., 1999; Moschis, 1985; Moschis & Mitchell, 1986; John, 1999). In this approach, the main agents of socialization assume a particular relevance, namely the parents through the styles of communication that they establish in the family (John, 1999; Moschis, 1985; Moschis & Mitchell, 1986).

The study of the socialization of adolescent consumption dates back to the early 1970s, with the study of the McLeod and Chaffee family communication styles (1972) and the consumption socialization study by Ward (1974).

The Relative Influence and Adolescent's Consumer Socialization

The adolescent's relative influence on family buying decisions is not adequately explained (Commuri & Gentry, 2000; John, 1999; Kaur & Singh, 2006; Kim & Lee, 1997; Niemczyk, 2015; Shah & Mittal 1997; Shim 1996). According to some researchers, there is a lack of theoretical explanation for the patterns of adolescent relative influence observed in family purchasing decisions (Commuri & Gentry, 2000; Kaur & Singh, 2006; Mangleburg, 1990).

In contrast, the approach to consumer socialization has drawn more attention from researchers in the literature on adolescent influence in the family compared to the relative influence approach (Commuri & Gentry, 2000; Chavda et al., 2005; Foxman et al., 1989b; Lackman & Lanasa, 1993). Almost 30 years ago, these latter researchers had pointed out the focus placed on the process of socialization of consumption, particularly the study of how adolescents are influenced by parents in their learning. The study of the influence of the adolescent according to the perspective of socialization of consumption has been more developed, especially with the collaboration of Moschis who proposed several theoretical-conceptual models. For John (1999: 183), the adolescent's consumer socialization has generated "an impressive body of research". This fact justifies the lack of interest of the investigators in studying the influence of the adolescent in the decisions of purchase according to the theories of socialization of consumption and the reduced recent literature on this subject.

The Adolescent as Influencer

According to the existing literature, the adolescents can play three consumption roles: (1) buyers with considerable financial capacity, (2) direct or indirect purchase influencers, and (3) an interesting future market for a larger variety of products and services (Aleti et al., 2015; Shahrokh et al., 2014; Srivastava, 2015).

In the study of adolescent influence, researchers considered that "influence" may involve two distinct dimensions. One is the result of direct efforts by the adolescent to influence certain decisions, the "active influence"; the other, also called "passive influence," considers that parental consumption behavior is influenced by their perception of adolescent preferences for particular products (Beatty & Talpade 1994; Kaur & Singh, 2006; Mangleburg, 1990).

Previous research undertaken on adolescent's role has focused on different aspects. Several studies concluded that adolescent participation is minor or null in the decision phase of the buying process (Ashraf & Khan, 2016; Khoo-Lattimore, Prayag, & Cheah, 2016; Watne & Winchester, 2011). Those results reveal the gap regarding the study of the adolescent's participation in the final decision of family purchases.

Several researchers have concluded that adolescent influence is specific to certain products (Beatty & Talpade, 1994; Kim & Lee, 1997; Shoham & Dalakas, 2005). The consideration of different categories of products according to its main user is related to the importance of studying to what extent the categories of product considered find different levels of adolescent influence in the decisions of family

purchases, being recognized a greater effort of influence in those products he/she is the primary user (Chavda et al., 2005; Commuri & Gentry, 2000; Kaur & Singh, 2006). Belch et al. (1985) and Shoham and Dalakas (2003) pointed to higher levels of influence of the adolescent depending on whether the decision concerned a product for own use. Kim and Lee (1997) reached the similar conclusions, that adolescents have higher levels of influence on purchases of products that they consider to be more important and in which they are the primary user.

Since the late eighties technological products have become a target of interest in the study of adolescent participation in family decision making process (Foxman & Tansuhaj, 1988). For that product category, results indicated some influence of the adolescent in the purchase decision (idem, 1988). Computer and mobile phone were pointed out as the products where the influence of the adolescent is more than the mid value in the decision of how much to spend (Kaur & Medury, 2011). Other researchers pointed out that the computer for family use had a high level of adolescent influence in the decision phase (Foxman et al., 1989a, b; Lackman & Lanasa, 1993; Lee & Collins, 2000). Foxman and Tansuhaj (1988) did not found the clothes purchase as having been entirely taken by the adolescent, but also pointed to a greater influence of him/her in the decision phase.

Beatty and Talpade (1994) concluded that the influence of the adolescent in the information gathering and decision-making phase was greater for the purchase products for his own use, but with a decision shared between the adolescent and his parents. Lee and Beatty (2002) also concluded by the adolescent's influence in purchase decision, with a shared decision between parents and adolescents in the choice of restaurant for dinner. However, the researchers only studied that purchase decision. Belch et al. (1985) found that adolescents had a greater influence on the decision to buy breakfast cereals, but this influence was, on average, lower than that of their mother and lower than the one they had when they started buying.

Adolescent's age is considered one of the main explanatory variables for his influence on family purchases (Ali et al. 2013, Shergill et al. 2013, Gentina et al. 2013, Kaur & Singh, 2006, Shoham & Dalakas, 2005; Kim & Lee, 1997). Kim and Lee (1997) and Beatty and Talpade (1994) found that older adolescents exert greater influence on family purchase decisions. Some authors have pointed the importance of establishing differences between two adolescent age groups as an explanatory factor for their influence on family buying decisions, the younger ones (12 to 15 years old) and the older adolescents (16 to 19 years old), with the second group presenting more consumer skills (Beatty & Talpade, 1994; Belch et al., 2005; Shergill et al., 2013).

The adolescent's gender often appears as one explanatory factor for their influence on family purchase decisions (Ali et al., 2013; Watne & Winchester, 2011; Shergill et al., 2013; Gentina et al., 2013; Kaur & Singh, 2006; Shoham & Dalakas, 2005). Moschis and Mitchell (1986) concluded that female adolescents appear to be more likely than male adolescents to participate in all phases of the purchasing decision process in general and to decide to purchase products in particular. Lee and Collins (2000) and Watne and Winchester (2011) also concluded that female adolescents exert higher levels of influence than male adolescents in family buying decisions.

Adolescents influence their parent decisions through their knowledge and expertise on some areas (Aleti et al., 2015; Watne & Winchester, 2011). Thus, product knowledge should lead to greater influence attempts, once the other members recognize the adolescent's knowhow regarding a given service or product (Chitakunye, 2012; Belch et al., 2005; Shah & Mittal, 1997; Beatty & Talpade,1994). Chitakunye (2012) argued that parents encourage adolescents to use their cognitive abilities in consumer situations. Belch et al. (2005) pointed out adolescents "would be expected to exhibit greater knowledge"

and "have acquired more information on products/ services" (p. 570). Aleti et al. (2015) and Watne and Winchester (2011) suggested that adolescents exercise greater influence levels when they have more product knowledge.

The mother's occupational status has a significant effect on the adolescent's influence in a family, with adolescents having greater influence when their mothers work outside the home (Sharma & Sonwaney, 2014, 2013; Isin & Alkibay, 2011, Lee & Beatty, 2002; Ahuja & Stinson, 1993). According to Sharma and Sonwaney (2014, 2013), the mother's absence increases the adolescents purchase decisions. Adolescents of full time employed mothers shopped for their clothing more often than those whose mothers have part time or no employment (idem, 2014).

Literature has shown the need to consider the following factors as explanatory of the adolescent's influence in the family purchase decisions: adolescent's personal characteristics, family characteristics (Ahuja & Walker, 1994; Kaur & Medury, 2013; Kushwaha, 2017; Shergill et al, 2013; Watne et al., 2014), and mother's occupational characteristics (Sharma & Sonwaney, 2013, 2014). The adolescent's personal characteristics include: adolescent's age and gender and product's knowledge. Finally, the mother's occupational status as her occupational characteristics.

METHODOLOGY

The present research is exploratory, aiming to identify dimensions that contribute to adolescent's influence on family purchase decisions according to the mother's perception. The population considered is composed of Portuguese families with at least one adolescent (between 12 and 19 years).

Past researchers revealed difficulty in selecting probabilistic samples, and thus data collection usually comes from convenience samples (Aleti et al., 2015; Srivastava, 2015; Kim & Lee, 1997). In the present study, due to the lack of information provided by official organisms, it was also necessary to consider a non-probabilistic sample. The collected sample was focused on households with at least one adolescent between 12 and 19 years old (Aleti et al., 2015; Srivastava, 2015; Kim & Lee, 1997; Beatty & Talpade, 1994).

Explained Variable

Adolescent's relative influence in decision making process has been mostly measured by likert scale in past research (Foxman et al., 1989a, b; Kim & Lee, 1997; Mangleburg, 1999; Shahrokh & Khosravi, 2014). Following Beatty and Talpade (1994) and Shoham and Dalakas (2003) proposals, an explained variable measurement scale was used where the mother's perception may vary between 1 and 7 (where 1 = I had no influence, and 7 = I had all influence).

Explanatory Variables

The adolescent's personal characteristics involve three variables: the adolescent's gender, the adolescent's age and the knowledge of the product. The variable "age" is an ordinal variable, so it can assume values between 12 and 19 years, according to the proposal of Lee and Beatty (2002). The variable "product knowledge" will be measured according to the proposal presented by Beatty and Talpade (1994), accord-

ing to which this represents subjective knowledge. A seven-point Likert scale is used, ranked completely disagree (1) to fully agree (7). The item to be measured will be translated by the phrase: "before buying this product I would describe myself as being very familiar with this product category" (p. 335).

The professional characteristics of the mother involve the variable "occupational status" uses the scale of measurement according to the proposal presented by Lee and Beatty (2002), according to which the occupational status of the mother will be divided into three categories: mothers who do not work outside (eg secretaries, sellers) and mothers of high occupational status (eg, lawyers, managers). The adolescent's age, gender and the product knowledge.

Data Collection Procedures and Sample

The research was conducted in May 2016. A total of eleven high-schools were contacted, from Lisbon, Setúbal, Beja and Portimão districts, in order to collect the necessary data. Those districts posess demographic data similar to the average for Portugal, namely the average size of the household. Thus, letters were sent to the Executive Councils of several schools, and all those schools agreed to participate in the study. Then, each school level form teachers were contacted, and each teacher was instructed to provide the students with a letter and a questionnaire to the mother requesting her participation in the study. During this phase, 2.800 questionnaires were delivered by teachers in the classrooms. Students, aged 12 to 19 years, were instructed to deliver the questionnaires back a few days later, fully completed by their mothers. Finally, the questionnaires were collected during June 2016. This resulted in a total of 966 questionnaires fully answered by mothers, which meant a response rate of 34,5%. At the end of the data collection, which represents a higher number than those presented by previous studies (Kaur & Medury, 2013; Shergill et al., 2013; Shoham & Dalakas, 2003).

A questionnaire survey was chosen for this study (Aleti et al., 2015; Srivastava, 2015). Mostly, studies on adolescent's influence on family buying decisions used the questionnaire survey as method for collecting empirical data (Aleti et al., 2015; Srivastava, 2015; Shoham & Dalakas, 2005, 2003).

Product Categories Studied

In the literature on adolescent influence on purchasing decisions, several authors pointed out that the study of product categories should be divided into: products for adolescent use and products for family use (Beatty & Talpade, 1994; Kim & Lee, 1997). Based on this classification, in the present chapter two product categories will be studied. The products for adolescent's use are: clothes, mobile phone, and bedroom furniture (Akinyele, 2010; Niemczyk, 2015; Watne et al., 2014). The products for family use are: the computer, the breakfast cereals, and the living room furniture (Akinyele, 2010; Niemczyk, 2015; Watne et al., 2014). The product categories selection derives from the literature review. The products selected have in common the fact that they are products that are part of family purchases, like bedroom furniture, breakfast cereals, and living room furniture (Belch et al, 1985), there are also technological products (Foxman & Tansuhaj, 1988; Foxman et al., 1989a, b; Kaur & Medury, 2011; Kim & Lee, 1997), and of great importance to their users, like clothes (Beatty & Talpade, 1994; Foxman et al., 1989a, b; Kim & Lee, 1997). Furthermore, with the literature scarce and absent in relation to the purchase of mobile phones, little is known about the influence of the adolescent in this category of product within families (Kaur & Medury, 2011).

Statistical Techniques Used

The research objectives determine the data analysis method to be used. In the past research, several authors have used linear regression to study the adolescent's influence in family buying decisions (Beatty & Talpade, 1994; Mangleburg et al., 1999). However, there is no knowledge of the use of logistic regression in that area of knowledge. There are two essential reasons for using logistic regression in this study: the variables level of measurement and the explained variable characteristics.

Variables Measurement

Logistic regression does not impose any restrictions on the explanatory variables considered (Hutcheson & Sofroniou, 1999). The adolescent's service knowledge is an ordinal variable, classified in a Likert scale with seven points: from completely disagree (1), completely agree (7). The mother's occupational status is ordinal, classified in the present investigation with three categories: high, low and domestic.

The Explained Variable

The explained variable, measured through a seven-point range scale, was transformed into a dichotomous variable. Thus, this allows us to consider, for values from 1 to 4, that the mother perceives the adolescent as having influence in that purchase decision. On the other hand, mother ratings in the range of 5 to 7 means that the mother perceives no adolescent influence in that decision. The intermediate point of the scale, which corresponds to the value 4, classifies both the members with a shared influence in the final purchase decision (Baía, 2018; Beatty & Talpade, 1994; Shahrokh, 2014). Therefore, the values in the range 5 to 7, will correspond to 0 = does not influence; and values from 1 to 4 will correspond to the value 1 = influence.

Variables Selecting Method for the Logistic Regression Models

The adolescent relative influence in purchasing decisions is a binary choice model, the main concern was the parameters' estimation. For the study of the six products, six logistic regression models were considered. According to Hutcheson & Sofroniou (1999), the ordinal or interval data can be transformed into dichotomous data, allowing its analysis for example in logistic regression models. The Forward LR method of inclusion of variables will be used for each one of the six logistic regression models.

DATA ANALYSIS AND FINDINGS

Internal Consistency

The Cronbach's α ranks high preferences among the several available methods to estimate internal consistency in most researcher. The reliability of a measure refers to its ability to be consistent. If a measuring instrument always gives the same results (data) when applied to structurally equal targets, we can trust the meaning of the measure and say that the measure is reliable (Maroco & Garcia-Marques, 2006). The

α, which must vary from 0 to 1, can be less than 0, which happens when the mean correlation between the items is negative (idem, 2006). As regarding the internal consistency presented in this chapter, the Cronbach's α coefficient presents a value of 78.4%, which means that the test is 78.4% reliable, and is taken as indicating satisfactory reliability, since the value is higher than 70%.

Internal Validity

Given the divergence of opinions among family members about the adolescent's influence, the internal validation was a problem successively identified in previous studies (Beatty & Talpade, 1994; Belch et al., 1985; Foxman et al., 1989b). Belch et al. (1985) were among the first researchers to report this issue.

Several researchers have opted to include the adolescent and one or both parents as respondents in their studies in this area (Beatty & Talpade 1994; Foxman et al., 1989a, b; Ishaque & Tufail, 2014; Shoham & Dalakas, 2005; Watne & Winchester, 2011), which has raised lack of internal validity of the models. Other researchers have measured the mother's perception, considering her as the best informant of the adolescent's influence (Filiatrault & Ritchie, 1980; Swinyard & Sim, 1987). So, mother has been pointed out the most reliable member to that aspect (Kim et Lee 1997; Mangleburg et al., 1999; Neely, 2005).

In the present research, the mother's inquiry was chosen, so the scale offers guarantees of internal validation of influence construct. The scale used measure the relative influence by comparing the influence of the mother with adolescent's influence, which should also provide some external validation.

Sample Demographic Characteristics

According to the data reported by mothers, the age group from 12 to 15 years old represents 51.5% of the total sample collected, which means there is an equal distribution between younger (from 12 to 15 years old), and older adolescents (16 to 19 years old), as can be seen from Table 1. Results also point to a distribution of 54% for female adolescents of the households studied.

As can be seen from Table 2, concerning the mother's occupational status, the most frequent category corresponds to low occupational status, with a rate of 49.5% of the mothers. The second most frequent category is high occupational status, with 32.1% of the total.

As for the monthly post-tax income of the households (see Table 2), the most frequent represented income range is between 500 and 1,000 euros, with 32.3%. The second most frequent monthly income range among respondents is 1,001 to 1,500 euros, with 25.1%.

Explanatory Variables

Next, considering the adolescent's influence on the purchase for each of the six products under study, the behavior of each of the explanatory variables will be analyzed.

With regard to the purchase of clothes for the adolescent, Table 2 point out that product knowledge adds explanatory capacity to the adolescent influence in the decision to buy that product. Thus, it is considered the adolescents with greater product knowledge exert more influence in the purchase of clothes for his/her own use than the adolescents with less product knowledge.

As can be seen from Table 2, the mother's occupational status does add explanatory capacity to the adolescent influence in the decision to buy clothes for his/her own use. Thus, it is considered that adolescents living in households with higher occupational status mothers have more influence in clothes.

Table 1. Demographic profile of participants (percentage)

Demographics	Valid Percent
Adolescent's age range	
12 to 15	51.5
16 to 19	48.5
Adolescent's gender	
Male	46
Female	54
Mother's age range	
25 to 34	8.7
35 to 49	76.5
50 to 64	14.5
More than 64	0.3
Mother's educational level	
No Schooling	0.2
Basic education	24.7
High school	44.3
Bachelor's Degree	6.7
University graduation	20.3
Masters or PhD	3.7
Mother's professional category	
Housewife	17.6
Low-qualified or Unskilled Workers	6.1
Plant and Machine Operators and Assembly Workers	2.9
Workers, Builders and Similar Workers	6.6
Farmers and Skilled Workers in Agriculture and Fisheries	1
Service and Sales Personnel	15
Administrative and Similar Personnel	15.5
Technicians and Professionals of Intermediate Level	10.9
Specialists of the Intellectual and Scientific Professions	8.7
Senior Management and Directors	11.1
Mother's occupational status	
Nonworking	17.6
Low occupational status	47.2
High occupational status	30.6
Family income	
Less than 500 euros	11.3
From 500 to 1,000 euros	32.3
From 1,001 to 1,500 euros	25.1
From 1,501 to 2,500 euros	21
More than 2,500 euros	10.4

Table 2. Logistic regression for clothes (variables in equation)

		B	S.E.	Wald	df	Sig.	Exp(B)	95% C.I.for EXP(B)	
								Lower	Upper
Step 1	Product Knowledge	0.699	0.097	51.893	1	0	2.013	1.664	2.434
	Constant	-0.158	0.427	0.137	1	0.711	0.854		
Step 2	Mother's ocupacional status	0.55	0.279	3.892	1	0.049	1.733	1.004	2.991
	Product Knowledge	0.716	0.099	52.253	1	0	2.045	1.685	2.483
	Constant	-1.35	0.739	3.342	1	0.068	0.259		

Table 3. Logistic regression for mobile phone (variables in equation)

		B	S.E.	Wald	df	Sig.	Exp(B)	95% C.I.for EXP(B)	
								Lower	Upper
Step 1[a]	Product Knowledge	0.687	0.076	82.875	1	0	1.988	1.715	2.306
	Constant	-0-872	0.356	6.006	1	0.014	0.418		
Step 2[b]	Adolescent's age	0.158	0.072	4.889	1	0.027	1.171	1.018	1.348
	Product Knowledge	0.644	0.078	68.638	1	0	1.903	1.634	2.216
	Constant	-1.258	0.398	9.979	1	0.002	0.284		

For the purchase of mobile phone for adolescent use, Table 3 point out that product knowledge adds explanatory capacity to the adolescent influence in the decision to buy that product. Thus, it is considered the adolescents with greater product knowledge exert more influence in the purchase of clothes for his/her own use than the adolescents with less product knowledge.

The adolescent's age does add explanatory capacity to the adolescent influence in the decision to buy clothes for his/her own use (see Table 3). So, it is considered that older adolescents (ages 16 to 19) have more influence in mobile phones than younger adolescents (ages 12 to 15).

For the purchase of furniture for adolescent bedroom, Table 4 point out that product knowledge adds explanatory capacity to the adolescent influence in the decision to buy that product. Thus, it is considered the adolescents with greater product knowledge exert more influence in the purchase of furniture for his/her own bedroom than the adolescents with less product knowledge.

The adolescent's age does add explanatory capacity to the adolescent influence in the decision to buy bedroom furniture for his/her own use (see Table 4). So, it is considered that older adolescents have more influence in bedroom furniture than younger adolescents.

As can be seen from Table 4, the mother's occupational status does add explanatory capacity to the model of adolescent's influence in the decisions to buy family vacations. Thus, it is considered that adolescents living in households with higher occupational status mothers have more influence in bedroom furniture.

When considering the computer for family use purchase, product knowledge adds explanatory capacity to the adolescent influence in the decision to buy that product (see table 5). Thus, it is considered the adolescents with greater product knowledge exert more influence in the purchase of computer for family use than the adolescents with less product knowledge.

Table 4. Logistic regression for bedroom furniture (variables in equation)

		B	S.E.	Wald	df	Sig.	Exp(B)	95% C.I.for EXP(B)	
								Lower	Upper
Step 1[a]	Product Knowledge	0.772	0.056	188.898	1	0	2.164	1.939	2.416
	Constant	-1.747	0.19	84.35	1	0	0.174		
Step 2[b]	Mother's ocupacional status	0.349	0.128	7.445	1	0.006	1.418	1.103	1.821
	Product Knowledge	0.789	0.057	189.848	1	0	2.202	1.968	2.463
	Constant	-2.541	0.354	51.563	1	0	0.079		
Step 3[c]	Mother's ocupacional status	0.361	0.129	7.875	1	0.005	1.435	1.115	1.846
	Adolescent's age	0.115	0.042	7.659	1	0.006	1.122	1.034	1.218
	Product Knowledge	0.785	0.058	184.932	1	0	2.192	1.957	2.454
	Constant	-3.035	0.403	56.708	1	0	0.048		

Table 5. Logistic regression for computer (variables in equation)

		B	S.E.	Wald	df	Sig.	Exp(B)	95% C.I.for EXP(B)	
								Lower	Upper
Step 1a	Product knowledge	0.925	0.066	194.157	1	0	2.522	2.214	2.872
	Constant	-2.657	0.292	82.692	1	0	0.07		
Step 2b	Adolescent's age	0.135	0.053	6.373	1	0.012	1.145	1.031	1.271
	Product knowledge	0.901	0.067	182.623	1	0	2.461	2.16	2.805
	Constant	-3.089	0.346	79.784	1	0	0.046		

The adolescent's age does add explanatory capacity to the adolescent influence in the decision to buy computer. So, it is considered that older adolescents have more influence in computer than younger adolescents.

As can be seen from Table 6, the mother's occupational status does add explanatory capacity to the model of adolescent's influence in the decisions to buy family breakfast cereals. Thus, it is considered that adolescents living in households with higher occupational status mothers have more influence in breakfast cereals for family consumption.

Table 6. Logistic regression for breakfast cereals (variables in equation)

		B	S.E.	Wald	df	Sig.	Exp(B)	95% C.I.for EXP(B)	
								Lower	Upper
Step 1a	Product knowledge	0.98	0.078	158.505	1	0	2.666	2.288	3.105
	Constant	-2.803	0.346	65.546	1	0	0.061		
Step 2b	Mother's ocupacional status	0.366	0.174	4.402	1	0.036	1.442	1.024	2.029
	Product knowledge	0.974	0.078	156.996	1	0	2.649	2.274	3.084
	Constant	-3.541	0.503	49,532	1	0	0.029		
Step 3c	Mother's ocupacional status	0.373	0.175	4.534	1	0.033	1.452	1.03	2.047
	Adolescent's age	-0.122	0.059	4.32	1	0.038	0.885	0.789	0.993
	Product knowledge	0.976	0.077	158.809	1	0	2.653	2.279	3.087
	Constant	-3.017	0.555	29.492	1	0	0.049		

The adolescent's age adds explanatory capacity to the adolescent influence in the decision to buy breakfast cereals. So, it is considered that older adolescents have more influence in that product than younger adolescents.

Product knowledge is also a variable important in adds explaining the adolescent influence in breakfast cereals. Therefore, adolescents with greater product knowledge exert more influence in the purchase of that product than the adolescents with less product knowledge.

Table 7 reveals that the adolescent's gender does add explanatory capacity to the adolescent influence model in the decision to buy family living room furniture. Thus, female adolescents do have a greater influence than male adolescents on that product category.

Product knowledge is also a variable when considering the adolescent influence in living room furniture. Therefore, adolescents with greater product knowledge exert more influence in the purchase of that product than the adolescents with less product knowledge.

Explanatory Variables Interpretation

Regarding the study of the adolescent's influence in the decision to buy the six products under study, the analysis of -2LL allows us to conclude that the exogenous variables contribute to explain the adolescent's influence in those purchases. This is reinforced by the Chi-square, when pointing out that there is a large part of the explained variance of the logistic regressions when considering the variables product knowledge, the mother's occupational status, adolescent's age, and adolescent's gender.

DISCUSSION

The present investigation allowed a total of 966 fully completed questionnaires, which represents a larger sample than the generality of past studies (Ahuja & Stinson, 1993; Al -Zu'bi, 2016; Ali et al., 2013; Ashraf & Khan, 2016; Beatty & Talpade 1994; Darley & Lim, 1986; Chikweche et al., 2012; Chitakunye, 2012; Mangleburg et al., 1999).

In the present chapter, consistent with most past studies on households, a convenience sample was used (Al -Zu'bi, 2016; Ali et al., 2013, 2015; Ashraf & Khan, 2016; Chikweche et al., 2012; Chitakunye, 2012; Mangleburg et al., 1999).

Table 7. Logistic regression for living room furniture (variables in equation)

		B	S.E.	Wald	df	Sig.	Exp(B)	95% C.I.for EXP(B)	
								Lower	Upper
Step 1a	Product knowledge	1.046	0.067	243.301	1	0	2.845	2.495	3.245
	Constant	-3.59	0.236	253.061	1	0	0.023		
Step 2b	Adolescent's gender	0.418	0.179	5.485	1	0.019	1.519	1.071	2.156
	Product knowledge	1.041	0.067	241.825	1	0	2.832	2.484	3.229
	Constant	-4,.91	0.368	142.374	1	0	0.012		

Adolescent's Age

Regarding this variable, the most frequent value is the age of 17 years, with a rate of 16,8%. The second most frequent age among respondents is 16 years, with 14,3%.

In Darley & Lim (1986) and Shergill et al. (2013) studies, the most frequent adolescents's age was 15 years old.

The adolescent's age presents an equal distribution of the two groups of adolescents under study: 51,5% are younger adolescents (from 12 to 15 years old), and 48,5% are older (16 to 19 years old), which is consistent with previous studies (Beatty & Talpade, 1994).

Adolescent's Gender

According to the data reported by the mothers, the results of the present investigation point to a distribution of 54% for female adolescents, whereby male adolescents are only 46% of the total number of adolescents within households studied. The distribution among the adolescents' gender is similar to that found in the study by Ali et al. (2013), with 46% of adolescent boys and 56% of girls. Ali et al. (2015) presented a more unbalanced sample in their study with a percentage of 79.6% of adolescent girls.

Mangleburg et al. (1999) also had an unbalanced distribution relative to the sex of adolescents. The authors present as results 74% for the adolescents belonging to the female gender.

Product Knowledge

The product knowledge was pointed out as an important adolescent resource, that should lead to higher levels of influence attempts' in certain purchases (Aleti et al., 2015; Beatty & Talpade, 1994; Ekstrom et al., 1987; Shah & Mittal, 1997; Watne & Winchester, 2011).

Aleti et al. (2015, p. 180) pointed out that "leisure travelling is clearly of great interest to young Vietnamese consumers. Parents and grandparents have learnt to use these products though secondary consumer socialisation, which tends to be a slower process". Shah and Mittal (1997) have also pointed to product knowledge as a relevant variable in determining the influence of the adolescent in family buying decisions. The authors state that "any generation that perceives the other as possessing these characteristics as an expert in the category of product, in a particular brand or other item, will tend to receive influence from the latter" (idem, 1997, p. 56).

Previously, other researchers have argued that "knowledge affected the perceived influence of the adolescent in the research and decision-making phases in the purchase of equipment, which suggests that for certain products, knowledge has an interest" (Beatty & Talpade, 1994, p. 338),

Ekstrom et al. (1987) suggest that adolescents have a greater knowledge about the product when compared with their parents. However, as mentioned, the authors did not confirm this proposition (ibidem, 1987).

The present chapter results revealed that the explanatory variable knowledge of the product adds explanatory capacity to the adolescent's influence in the family purchase decisions, in line with previous research (Aleti et al., 2015; Watne & Winchester, 2011).

Mother's Occupational Status

The most frequent value is the low occupational status, with 49,5%. The second most frequent category of among respondents, with a rate of 32,1%, is the high occupational status.

The demographic characteristics are, as one could expected, distinctive compared to some of the household surveys conducted in the United States, where mother's occupational status tend to be higher (Darley & Lim, 1986; Mangleburg et al., 1999).

Lee & Beatty (2002) pointed to a significant effect of the mother's occupational status on adolescent's influence on family purchases. If mothers do not work outside the home, older adolescents generally exert more influence on the final decision than those children of households whose mothers work (idem, 2002).

In this chapter, however, that adds explanatory capacity to the purchase of family, with mother's occupational status presenting a positive effect, and the adolescent exerting greater influence when his mother has a high status, which is consistent with previous research (Watne & Winchester, 2011).

CONCLUSION

Facing these results, one can conclude that: There is influence of the adolescent in the purchase of products for family use and for those for adolescent use. Adolescent's age and gender, product knowledge and the mother's occupational status are explanatory variables of the adolescent's influence in the purchasing decisions for the six products under study. The adolescent influences the purchase of products for family consumption in which his product knowledge is higher.

Chapter Contributions

The present chapter provides several contributions to this area of knowledge. In the first place, the main contribution is the suggestion of a theoretical-conceptual framework that provides explanatory capacity of the adolescent's influence in the decisions of family purchases, and it reinforces the relevance of including the adolescent in the final decision, which is innovative in the literature. The interest of the results is reinforced by the fact that three products categories for family use has been studied, and the adolescent's influence is verified. Thus, the research indicated the adolescent's influence in the purchase of living room, computer and breakfast cereals for family use/consumption, which is also an innovative literature result.

Results also point to the adolescent's age and gender, product knowledge and the mother's occupational status as the relevant explanatory variables in the six purchases considered. These results are innovative in the study of family purchases.

Finally, producing companies and retailer marketers should focus their efforts not only on adolescent satisfaction in categories of products for their personal use but also on categories of products for family use. The results, when indicating the participation of the adolescent in the final decision to purchase furniture for the living room, computer and breakfast cereals for family use/consumption. Thus, the chapter emphasize the need to satisfy that member of the family, who besides being a user of the product, participates in the final purchase decision, being an influencer in the final decision on purchasing products

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for family use and for his own use, playing an important role when considering family consumption. This is a very important contribution since past research have considered mostly product categories for adolescent's use.

Business Implications

The chapter offers a contribution to companies by providing evidence of adolescent´s influence on family purchases. Given the adolescents relevance within family decisions, it is important that producing companies and retail marketers focus their efforts on adolescent satisfaction, adopting strategies adjusted to families.

Those marketing professionals should direct the marketing messages to younger and more knowledgeable adolescents and to those adolescents with high occupational status mothers when considering family breakfast cereals. Producing companies and retail marketers should also focus their efforts to female and more knowledgeable adolescents and to those adolescents with high occupational status mothers when it comes to buy furniture for the living room. Those marketers should still focus on older and more knowledgeable adolescents for family computer.

With regard to products for adolescent use, retail managers and producer companies should consider the adolescent's characteristics like age, gender and product knowledge, as well as the occupational status of the mother when buying clothing, mobile phone, and bedroom furniture. The marketers should still focus on more knowledgeable adolescents and to those adolescents with high occupational status mothers when it comes to buying clothes for their own use. For the mobile phone, they should direct its resources for older and more knowledgeable adolescents and to those adolescents with high occupational status mothers. Finally, in relation to furniture for the adolescent's bedroom, the marketers should direct their efforts to the older adolescents, with greater knowledge of the product and with a mother with a higher occupational status.

Retail managers can adapt the offer of assortment to the adolescent, placing the products in places closer to the path that the adolescent performs inside the point of sale, for example, for breakfast cereals.

Retailers targeting adolescents should focus on identifying what parents will allow their children to purchase and offer merchandise that appeals to both parties.

By better accommodating both parents and adolescents' desires, retailers can increase sales and potentially better parent/child relationships.

Thus, if a decision is considered to be largely influenced by the adolescent, then the messages should be addressed and this family member. In the present investigation it was concluded that adolescents represent an active influential market in the family purchase decisions, so that marketers should adopt strategies that reflect the adolescent's role in those buying decisions, as well as the household characteristics. On the other hand, producing companies and retail marketers should focus their efforts on adolescent satisfaction in products/services for their personal use, and also on those categories for family use.

LIMITATIONS AND RECOMMENDATIONS

As the main objective of the present chapter to provide a response to the explanatory factors of the mother's perception of the adolescent's influence in six family buying decisions, the results provided an important answer in terms of contribution, but does not entirely explain the phenomenon, and concluded that the adolescent's influence in purchasing decisions is a function of the adolescent's age, gender, product knowledge and mother's occupational status. Thus, other variables should have also been considered in order to provide a more complete explanation, providing a higher quality of adjustment of those models. Furthermore, in this study, it was necessary to collect data from a convenience sample, although this procedure is consistent with most studies on households (Aleti et al, 2015; Yang et al., 2014; Chaudhary & Gupta, 2012).

Another limitation is the choice to inquiring only the mothers who are considered the most reliable family member in reporting the adolescent's influence (Ahuja, 1993; Ahuja e Stinson, 1993; Ahuja e Walker, 1994; Ahuja, Capella, & Taylor, 1998; Isin & Alkibay, 2011; Kim & Lee, 1997; Mangleburg et al., 1999), several authors have chosen to inquire one parent and the adolescent (Al -Zu'bi, 2016; Ashraf & Khan, 2016; Mau et al., 2016, 2014, Goswami & Khan, 2015; Sondhi & Basu, 2014).

SUGGESTIONS FOR FUTURE RESEARCH

In addition to the products that may be more associated with certain patterns of family consumption characteristics, it is important to point out as research opportunity the study on the adolescent's influence in the purchasing decisions for several other products/services. Application to other products for family use, like cars, television sets, food, among others. With regard to services, the study of services for family consumption, like eating out, hotel services, and other leisure activities will be interesting and should make an important contribution to this area of knowledge.

Other products or services that are interesting for adolescents to use, and that need more study, will be ipads, concerts / summer festivals, restaurants, motorcycles, among others.

On the other hand, the services/products of perceived adolescent's influence are not properly exhausted. Research in this area should focus on the influence of adolescents in the choice of services/products that are shared by the family versus those used by the parents; explore the mechanisms of decision making between male and female across this age range. Another research opportunity should be the study of single-parent families.

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