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# Advanced Digital Marketing Strategies in a Data-Driven Era



José Ramón Saura

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# Advanced Digital Marketing Strategies in a Data-Driven Era

Jose Ramon Saura  
*Rey Juan Carlos University, Spain*

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Business processes, services, and communications are important factors in the management of good customer relationship, which is the foundation of any well organized business. Technology continues to play a vital role in the organization and automation of business processes for marketing, sales, and customer service. These features aid in the attraction of new clients and maintaining existing relationships.

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## Section 1

### From Literature to Theory: Reviews, Concepts, and Definitions Linked to Digital Marketing

*This section presents chapters that develop reviews on digital marketing strategies, concepts linked to the use of data-centric strategies, and the main definitions that encompass the digital ecosystem of advanced digital marketing strategies in a digital era.*

#### Chapter 1

A Better Understanding of Big Data and Marketing Analytics: A Review ..... 1

*Francisco J. S. Lacárcel, Madrid Open University, Spain*

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Data mining and analysis is consolidating as a crucial practice in economic, educational, social, and business sectors. In this context, this study aims to identify and categorize the main strategies, metrics, and concepts that are derived from big data analytics (BDA) and marketing analytics (MA). This study follows a systematic literature review (SLR) of important scientific contributions made so far in this research area. The authors have identified through this study 13 key concepts related to big data analytics and 13 related to marketing analytics, which are classified and categorized according to their application in technologies or actions in digital marketing. The chapter concludes with a discussion between theoretical and practical implications on the results for future researchers.

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Consumers perform their activities through digital channels more often as a result of technological advancements where those advancements also allow marketers to reach excessive information about consumers, store them, and use them whenever and however they consider necessary. These big data provide businesses to understand the unmet demands and expectations of consumers and achieve a sustainable business success. Despite the importance of big data analytics for marketing of businesses, research on this issue is scarce. In order to contribute the literature, the purpose of this chapter is to reveal the importance of big data in the digital marketing environment. In line with this purpose, a

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Digitalisation has caused important changes that have affected people's lives on a social, economic, or personal level. These changes have affected both business and society in general. Therefore, companies had to adopt different strategies to reach with their users, since traditional methods were no longer effective in some cases. It is the case of marketing, where companies had to change or blend traditional marketing with digital marketing (i.e., to promote their products and services through the internet). The aim of this work is to analyse the existing literature on similarities and differences between traditional and digital marketing. The methodologies used to achieve these objectives were a systematic literature review and bibliometric analysis by Scopus. The results obtained have shown that both traditional and digital marketing are important for companies, so firms must find out which of them is more compatible with the company's objectives. This chapter provides practical lessons for entrepreneurs or marketing makers when choosing a type of marketing for their businesses.

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Digital Loyalty Programmes: Pull Strategies in B2B Channel Marketing ..... 51  
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Digital loyalty programmes are an increasingly common tool for business-to-business marketers hoping to increase repeat sales through deeper customer engagement. In consumer markets, such programmes do little to influence behavioural loyalty and disproportionately attract the firm's existing heavy buyers. Industrial buying, however, relies on direct sales channels and features negotiation and reciprocity. Loyalty effects may therefore differ in B2B, and although no clear picture yet exists, such knowledge is important as B2C digital loyalty programmes grow in popularity. Here, the authors describe programme membership's evolving characteristics over in a B2B scheme that was launched in the US metal-cutting tools manufacturer customer base. Findings are consistent with the idea that the scheme recruited the heaviest buyers earliest and had an insignificant effect on total revenue. The authors discuss managerial implications, particularly about (1) managing the rollout of similar schemes and (2) refocussing on the programme objectives to maintain sales from the lightest rather than the heaviest buyers.

## **Section 2**

### **Towards Practitioner Knowledge: Applied Digital Marketing Strategies**

*In order to understand how practitioners should develop digital marketing actions in their industries, this section presents several chapters that analyze from a business point of view the main actions linked to decision-making that CEOs, executives, and other company managers have to consider for the development and optimization of data-centric digital marketing techniques.*

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In this chapter, the main relationship between a company's use of data-driven methods and its international digital marketing strategies are examined. In particular, the question of how data-driven methods, like consumer analytics, helped the company in its internationalization efforts are outlined. By following the case study approach, the diverse digital business models, online advertising campaigns, and international digital marketing practices of the Chinese company Alibaba are investigated. As China's e-commerce market currently became one of the most dynamic ones in the world, and as Alibaba is one of the leading internet and e-commerce corporations worldwide, valuable insights are provided. Moreover, Alibaba's international digital marketing practices, underlying strategies, as well as adaptive capabilities are systematically analyzed. In addition, Alibaba's competitive behavior is investigated and compared with international companies and peers. In this context, the standardization versus adaptation paradigm is also revisited.

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Social movements have been transformed in the last decade by social networks, where the dynamics of the social protests have evolved and have been structured and viralized through social media. They are no longer just conversations between activists that stay on social platforms. The cyberactivism that takes place on Twitter or Instagram can also play a significant role in general society by influencing government decision making or shaping the relationships between citizens. In this chapter, the authors explore the main activist movements that took place in social media in the last decade: Occupy, BlackLivesMatter, and MeToo. The proposed approach used in this study facilitates the comparison of each movement while focusing on the user-generated content in social media. This study suggests the presence of four major categories to frame the content generated by the activists. The chapter concludes with the identification of three different approaches to the research of a future research agenda that should be considered for the study of the social movements from the UGC theory framework.

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Despite its popularity, search engine advertising is a particularly complex and demanding technique. One of the main challenges for Google Ads managers is to adequately monitor performance. Indeed, the literature identifies a plethora of metrics to measure the success of a search engine ads campaign. One research question arises: What are the metrics adopted by small and medium-sized companies to measure the performance of a Google Ads campaign? This chapter includes a mixed-method study with

digital marketing professionals experienced in managing Google Ads campaigns for Portuguese SMEs. Interviews helped highlight the main difficulties faced by SEM's Google Ads' managers and to identify the performance measures they mostly control. Then, a survey enabled to analyse the association between performance measures and campaigns' perceived success. The insights produced by this chapter are particularly interesting for researchers, teachers, business managers, and digital marketing professionals, as it presents important clues on measuring the effectiveness of Google Ads campaigns.

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This chapter will address the issue of online sales in the fast fashion sector, specifically Zara, the flagship brand of the Inditex textile group. Since 2012, Zara has been working on a plan to close, restructure, and optimize its physical shops, a process that was accelerated in 2017, and which has been affected by the global pandemic that began in early 2020. These two events have caused online sales to exponentially rise with, in turn, the percentage of returns. This is the objective of this chapter: to analyze where Zara is in terms of online sales and returns and how, through digital marketing and the application of tools such as big data, it can reduce the large volume of online returns that it has to deal with.

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The COVID-19 pandemic is an unprecedented event that has ravaged emergent economies like Mexico seriously. In this sense, several sectors like social impact startups (SIS) are called to participate in actions to recover more quickly in their operations, income, and competitiveness in the post-COVID era. In fact, digital marketing campaigns are alternatives for the Mexican SIS to raise its competitiveness again. Hence, this study aims to confirm the digital marketing model innovation (DMMI) through covariance-based structural equation modeling (CB-SEM) applied on a survey of 180 Mexican SIS during Dec-2020 to Feb-2021. The study's value is the model's validity of DMMI and its capability to determine digital marketing strategies to overcome emergency situations like COVID-19.

## Chapter 10

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The aim of this chapter is to analyse how family SMEs use digital media, particularly organizational websites, to disseminate information about their products, services, history, etc. To this end, the authors perform a descriptive analysis of 32 organizational websites from privately owned family SMEs located in the region of Andalusia (Southern Spain), emphasizing two differentiating strategies: promotion of the family firm brand and website quality level. On the one hand, the findings show that family firms are

to some degree reluctant to promote their family firm brand on their organizational websites, with the indicator of being a family firm as the most communicated. On the other hand, the findings reveal that family firms tend to develop organizational websites with an adequate quality level; however, the inclusion of components, such as FAQ or help sections or a bilingual option, need to be considered in the future.

## Chapter 11

Adapting Digital Strategies to a New Era: A Delphi-Based Analysis in the Fashion Industry ..... 192

*Rocío López Muniesa, Rey Juan Carlos University, Spain*

*Jose Ramón Saura, Rey Juan Carlos University, Spain*

*Eloísa Díaz-Garrido, Rey Juan Carlos University, Spain*

Fashion brands are continuously reinventing themselves to adapt their business strategies to emerging markets. In this paradigm, digital marketing becomes an essential tool for communication to the target audiences online. In digital ecosystems, a new way of sharing information is taking place in which brands interact with users to increase engagement and brand awareness. Accordantly, the objective of the present study is to explore what is the evolution of digital marketing and how it has affected the strategies applied by fashion brands on digital ecosystems after the COVID-19 pandemic. The research develops a Delphi method with the participation of seven fashion digital marketing experts, whose conclusions and analysis of results will allow future research to be linked to the objectives of the research. The results propose and discuss nine future directions and four research proposals focused on digital marketing in the fashion industry. In the future, these proposals may be used by research or fashion marketers as a starting point for future research studies and practice.

### Section 3

#### Case Studies: Advances in Digital Marketing Strategies Applied to Industries

*This section presents case studies and future research lines for the digital marketing sector focused on data analytics. The case studies encompass approaches to different business industries to, finally, show the pros and cons of developing digital strategies according to the characteristics of each case.*

## Chapter 12

How Digitalisation Is Influencing Traditional Food Restaurants in the Management of Their Marketing Strategies ..... 211

*Juan-Gabriel Martínez-Navalón, Rey Juan Carlos University, Spain*

There is no denying that digitalisation is a new revolution. At a time when technology is taking over all aspects of society in an exponential way, not introducing it into the management of companies is a clear mistake that could lead to their disappearance. But we cannot forget that the incorporation of technology is a challenge for any type of company and sector. This study analyses the importance of digitalisation in traditional restaurants and its influence on the management of marketing policies using case study analysis. Therefore, the aim of this study is to show how digitalisation for order management in these companies can also be applied to marketing policies. This is because, by monitoring and storing the customer's behaviour in the ordering process from start to finish, it is possible to know their preferences and searches in a more concrete way. Such information enables the company to maximise its resources by applying policies designed to meet customer needs, as well as to design targeted advertising to increase the chances of success of the advertising campaign.

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*Alberto Prado Román, Rey Juan Carlos University, Spain*

*Iria Paz-Gil, Rey Juan Carlos University, Spain*

*Miguel Prado Román, Rey Juan Carlos University, Spain*

Social networks are a very relevant tool for businesses to connect efficiently with many users at the same time. It means that in the second decade of the 21st century, companies have strengthened their strategies to expand their influence. In the higher education context, social media can help develop teaching strategies. Nevertheless, are they also relevant to expanding the professional capacity of researchers? Given this, this research aims to determine whether they are relevant within the research field and how they use them according to the researchers' position and the professional objectives set.

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*Jonathan Gomez Punzon, Rey Juan Carlos University, Spain*

Digitalization is one of the biggest changes in our fast-moving world. There are a lot of digital innovations in many different industries, which are also affecting the hospitality industry. Taking into consideration that travel and tourism is all about the combination between a wide range of experiences and on-site benefits, the implementation of the digitalization in this industry is completely necessary. As a part of the travel and tourism industry, the luxury hospitality segment is continuing to grow more than what was expected, reaching figures of big spending and revenue regarding luxury hospitality bookings, and it is even expected to grow more than 60% by 2026. Luxury hospitality brands have a lot of upcoming opportunities to generate discussions through digital tools and innovations, not only about bookings, but also covering the whole customer journey.

### **Chapter 15**

Approach to Social Media Marketing Strategies in Different World Regions: A Descriptive Study . 261

*Luis Matosas-López, Rey Juan Carlos University, Spain*

*Roberto Baelo Alvarez, University of León, Spain*

The present study, using a sample of university organizations from different world regions, aims to provide an overview of social media marketing strategies used in different geographical locations. For this purpose, the authors conducted a descriptive study of the communication patterns implemented by university institutions in four regions: Africa and the Middle East, North America, Latin America, and Europe. The study, which adopts a comparative format, contrasts the findings obtained in each of the aforementioned regions, highlighting the existence of both similarities and differences in the social media marketing strategies of the organizations observed. In line with previous research, the authors took Twitter as the social media platform to be monitored.

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## Preface

In the last decade, the Internet has dramatically changed how organizations and companies establish and develop their business strategies in the digital ecosystem (Pastor-Satorras & Vespignani, 2007). In this context, digital marketing has become one of the main domains for international business and commercial communication (Flanagin, 2020). Specifically, the increase in the use of new technologies and connected devices on the international level has led companies to use digital marketing strategies to promote their products and services on all types of devices, including laptops, cell phones, smart TVs, as well as in social networks (Bharadwaj et al., 2013).

The growing use of both digital marketing techniques and social networks has opened up novel opportunity for companies to collect and manage large amounts of data. These data, which include users' interaction with web pages, search habits, and so forth, reflect users' purchasing decisions and digital behavior (Saura et al. 2021).

As digital marketing has become one of the most important communication channels for companies, data-centric strategies have started to be used as key tools to improve decision-making, activity optimizations, and economic performance (Morabito, 2014).

In parallel, recent decades have witnessed the growing use of social networks (Wai Lai and Liu, 2020). The resultant link between the increased use of connected devices, digital marketing strategies to attract online leads, and the use of advanced data analysis techniques (Stone and Woodcock, 2014) has allowed companies to adapt to a new ecosystem where prerequisites of a company's business success on the Internet are data analysis, user segmentation, exploration of new business models (Flanagin, 2020).

Furthermore, the approach of data sciences techniques to digital marketing (Saura, 2020) has enabled digital marketing to take advantage of data-centric technologies and strategies, as data sciences techniques can focus their user behavior predictions on digital marketing techniques (Langan et al., 2019).

In summary, in the new data-driven decision-making era, the success of promotional and sales actions on the Internet largely depends on digital marketing and data analysis (Stone and Woodcoc, 2014). Digital marketing strategies enable companies to trace users' behavior and adapt their products and services accordingly to better match users' intentions and expectations. To this end, appropriate data and behavior prediction algorithms analyzing the results of digital marketing campaigns are used to optimize those campaigns and to increase their efficiency (Ribeiro-Navarrete et al., 2021).

The above underscores relevance of digital marketing and data-driven decision-making remains relevant for the creation and management of online knowledge in organizations.

## **DIGITAL CHALLENGES**

As mentioned above, appropriate management and development of data-centric digital marketing techniques is vital for the success of companies' strategies in digital ecosystems (Saura et al., 2021). Furthermore, the proper management of data from digital marketing techniques is essential in terms of ensuring optimization and automation of digital marketing to improve return on investment (ROI) of companies in the future.

In this context, in order to understand the main challenges of advanced digital marketing techniques in the data-centric era, it is necessary to address the following five challenges:

- Exploring the use of the main data-centric digital marketing techniques
- Establishing the main pillars for successful digital marketing techniques using data-centric tools.
- Proposing future lines of research for practical and theoretical development of advanced digital marketing strategies that work with data sources from the Internet
- Linking the business success to the use of social media marketing, digitalization, Big Data, among others, to the know-how of companies working with digital marketing.
- Understanding practitioners' experiences with the use and development of data-centric digital marketing techniques

Several previous studies have already sought to explore the use of the main data-centric digital marketing techniques (Saura et al., 2021; Ribeiro-Navarrete et al., 2021), from the analysis and collection of data techniques to the newest digital marketing approaches. Nowadays, the use of the Internet has become a habit that can be analyzed, understood, and studied with these techniques. The resultant knowledge can be meaningfully used to appropriately design advertisements, increase engagement, or predict behaviors and purchases (Johnsen et al., 2017).

From the digital marketing investor's perspective, understanding performance with the use of data-centric strategies such as investments in different social networks or digital platforms is essential for the development of trust in a highly competitive ecosystem.

While, from the traditional marketing point of view, there are different strategies to attract and maintain customers (Saura et al., 2019), from the digital perspective, companies should understand what main digital marketing techniques can be used to segment messages and promote the development of users' acquisition and loyalty actions (Flanagin, 2020). Accordingly, priority should be given to new digital marketing techniques that can work with data sciences and link them to a traditional perspective, in which users can be impacted with advertising actions (Bharadwaj et al., 2013).

Upon identification and analysis of the main data-centric digital marketing techniques, the fundamental pillars for their success must be established. As argued by several authors, from the theoretical point of view, digital marketing strategies can be developed for different purposes (Stone and Woodcock, 2014).

However, in order to succeed in the performance development in digital ecosystems, companies should also properly follow justified guidelines. Here, essential are specific objectives, such as increasing brand awareness and sales, optimizing ROI, or attracting new customers (Tiago et al., 2014; Saura, 2020).

Furthermore, taking into account both the digital ecosystem approach and the traditional one, the study of the industries where the activities are going to be developed and the success in the investments in such business, can determine the fundamental pillars for the choice a digital marketing technique or another (Saura et al., 2019).



As argued by Langan et al. (2019), in order to learn how these actions should be correctly optimized based on both industry and specific circumstances, digital marketing and data-centric decision-making should first be analyzed. In this respect, promising approaches in terms of improving digital marketing techniques are Artificial Intelligence (AI) linked to data automation and monitorization of data and actions in digital ecosystems, as these approaches are particularly helpful for data analysis and optimization (Johnsen, 2017).

Accordingly, based on the study of business cases, it is important to understand and propose future lines of research that target practical and theoretical development of data-centric decision-making (Ribeiro-Navarrete et al., 2021). At present, data sources available on the Internet are getting increasingly larger, which has made user-generated content (UGC) and user-generated behavior (UGB), also known as user-generated data (UGD), the main sources of data (Saura et al., 2020). To date, UGD has been extensively used to understand the structure and development of digital marketing techniques, as well as to train algorithms based on machine learning or Big Data to predict user actions in digital environments.

## **DIGITAL MARKETING DATA-BASED STRATEGIES: FROM THEORY TO PRACTICE**

In previous research, it has been frequently argued on the need to increase technical and knowledge skills in digital marketing by members and employees in charge of the development of these strategies in companies (e.g., Tiago and Veríssimo, 2014).

Therefore, of a particular relevance for practitioners is to have first-hand information through the use of data analysis techniques and digital marketing techniques, such as social media marketing, SEO, search engine rankings, inbound marketing, content marketing, branded content, video marketing, or influencer marketing, and so on (Bock et al., 2017).

Similarly, on the managerial level, it has been argued that the top management of companies still does not effusively support the use of digital environments (e.g., Sheikh et al. (2018). Therefore, there is an urgent need to effectively combine traditional and digital marketing investments according to the sales channel used by companies to develop their activities. Therefore, obtaining information from case studies and experiences from other companies to define and monitor appropriate actions is a relevant tool to develop innovative strategies and optimize companies' digital processes (Ardito et al., 2019).

Of note, practitioners' experiences are biased by different industries with specific characteristics and influencers. Yet, as argued by Stone and Woodcock (2014), experiences on the development of data-centric digital marketing techniques and their use should be shared among companies so that all companies can benefit from the insights and knowledge accumulated in the field.

## **ORGANIZATION OF THIS BOOK**

Taking into account the abovementioned considerations, this book is organized into 15 chapters. A brief description of each of the chapters is as follows.

Chapter 1 reviews the role of Big Data Analytics and Marketing Analytics techniques in a digital ecosystem characterized by digital marketing strategies. This chapter undertakes a systematic literature

## **Preface**

review of the contributions in Big Data Analytics and Marketing Analytics. Based on the results, the authors identify and discuss a total of 26 key indicators to measure actions in both areas.

Furthermore, Chapter 2 presents a comparative analysis of the main differences between traditional and digital marketing to understand the uses that companies make of the techniques encompassed in both perspectives. The literature review reveals that traditional and digital marketing are important for companies, so they should be combined and developed to obtain satisfactory results in their marketing campaigns.

The next contribution, Chapter 3, discusses the role of Big Data in digital environments from the theoretical and practical points of view. Therefore, this chapter analyzes definitions, components, and data sources related to Big Data that can be used in digital marketing by companies to boost their user acquisition strategies. Finally, based on the results of the review, several uses and best practices are presented.

Chapter 4 proposes an analysis of loyalty digital programs in Internet business. The authors describe membership's evolving characteristics over in a B2B scheme launched in the US metal-cutting tools manufacturer customer base. The study identifies the main particularities and implications of B2B loyalty digital programs.

From a different perspective, Chapter 5 focuses on the digital influence of social movements in social networks. This chapter highlights the role of social networks such as Twitter or Instagram and analyzes the social movements such as Occupy, BlackLivesMatter, and MeToo. Based on the results, the authors identify four content categories related to user-generated content (UGC) in social networks. In addition, three further research directions on social movements using the UGC theory framework are identified.

Next, Chapter 6 studies the evolution and use of digital marketing techniques in the fashion industry. Specifically, in order to identify the main digital marketing actions in this sector, the chapter develops an exploratory approach with the review and the Delphi method to interview fashion industry experts. Based on the results, the authors outline 9 future directions and 4 research proposals, which can be put into practice by companies focused on the digital ecosystem in the fashion industry.

Furthermore, Chapter 7 presents the case study of Alibaba and its international strategies based on data-driven methods. This chapter aims to understand how data-driven methods, such as consumer and behavioral analysis or international digital marketing practices, are developed. To understand Alibaba's strategies in a dynamic and changing digital ecosystem, the authors explore how Alibaba develops strategies on the international level, as well as compare the company with its main competitors.

Next, Chapter 8 reviews Google Ads to analyze the main challenges that managers should appropriately monitor in the performance of their campaigns. The authors present the main metrics used by small and medium-sized enterprises (SMEs) to measure and monitor the digital advertising actions by using Google Ads. Finally, using a survey, the authors analyze the association between performance measures and campaigns' perceived success.

The next contribution to this book, Chapter 9, reviews the digital strategy carried out by Zara. Specifically, the authors consider the data-centric strategies and decision-making performed by this international fashion company. Among the conclusions, the authors highlight the initiatives to adapt the company's stores to a hybrid model where the company's digital presence is gaining strength to increase sales. The authors also emphasize flexibility and support for new innovative initiatives to adapt Zara's business model to the new era based on data and Internet sales.

In addition, Chapter 10 studies a Digital Marketing Model Innovation (DMMI) using the Covariance-Based Structural Equation Modeling (CB-SEM) on 180 social impact startups. Social impact startups are reported to more quickly recover in their operations, income, and competitiveness in the post-COVID-19

era, which reinstates the importance of digital marketing and data analysis for boosting visibility in companies. The authors conclude with highlighting the DMMI value and the analytics capabilities of post-COVID-19 digital marketing strategies.

From a similar perspective, Chapter 11 presents an analysis of how family SMEs use digital media, focusing the analysis on the companies' websites. Specifically, the authors explore the promotion of the family firm brands and website quality levels. The chapter concludes with a discussion of relevant promotion strategies of family firms on the Internet.

Next, Chapter 12 reviews the use of social networks as a channel to connect companies with their clients. The specific focus of this chapter is on higher education social networks and its use by researchers. The results reveal several challenges to increase the visibility of researchers' profiles in social networks and their objectives in higher education digital strategies.

Assuming a historical perspective, Chapter 13 reviews the digitalization process and its evolution linked to digital innovations. This chapter focuses on the hospitality sector to understand how digitalization can improve the processes in this area. The authors analyze the customer journey related to the digitalization processes in hospitality and investigate its influence on the increase of tourism.

Furthermore, Chapter 14 presents an overview of the use of social networks by universities across the globe. The authors compare the use of tools linked to social networks and the messages shared by faculty to establish a common action protocol. The results identify similarities in social media marketing strategies and highlight the use of Twitter as the basis for the use of social networks in this area.

Finally, Chapter 15 explores the use of digitalization in traditional restaurants and its influence on marketing management strategies. The results of this chapter suggest that monitored strategies added to restaurant marketing management improve processes, anticipate demand, and facilitate interpretation and prediction of customer behavior. The chapter concludes with a discussion of implications and future lines of research.

*Jose Ramon Saura*  
*Rey Juan Carlos University, Spain*

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## Section 1

# From Literature to Theory: Reviews, Concepts, and Definitions Linked to Digital Marketing

*This section presents chapters that develop reviews on digital marketing strategies, concepts linked to the use of data-centric strategies, and the main definitions that encompass the digital ecosystem of advanced digital marketing strategies in a digital era.*

# Chapter 1

## A Better Understanding of Big Data and Marketing Analytics: A Review

**Francisco J. S. Lacárcel**

*Madrid Open University, Spain*

**Leticia Polanco-Diges**

*Rey Juan Carlos University, Spain*

**Felipe Debasa**

*Rey Juan Carlos University, Spain*

### **ABSTRACT**

*Data mining and analysis is consolidating as a crucial practice in economic, educational, social, and business sectors. In this context, this study aims to identify and categorize the main strategies, metrics, and concepts that are derived from big data analytics (BDA) and marketing analytics (MA). This study follows a systematic literature review (SLR) of important scientific contributions made so far in this research area. The authors have identified through this study 13 key concepts related to big data analytics and 13 related to marketing analytics, which are classified and categorized according to their application in technologies or actions in digital marketing. The chapter concludes with a discussion between theoretical and practical implications on the results for future researchers.*

### **INTRODUCTION**

Undeniably, the environment in which society is living is increasingly dynamic and changing, which according to many studies is called VUCA. This acronym is used to reflect the Volatility, Uncertainty, Complexity and Ambiguity of the world we live in (Kaivo-oja and Lauraeus, 2018; van Tulder et al., 2019; Patnaik, 2020).

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In this context, the study and analysis of data is acquiring significant importance in most sectors, especially when they occur in a digital environment. Big Data is known as the large amount of data that it is generated in these ecosystems, and it is characterized by the accessibility to them, making data a valuable material for those who are able to interpret and use them optimally (Fosso Wamba et al., 2018).

On the other hand, the field of data science and analysis are areas that are in continuous growth and evolution. There is an increasing demand for analytical and data science profiles in most companies and even institutions (Saura, 2020). Therefore, it could be said that the so-called Big Data Analytics (BDA) is considered an important element of differentiation and competitive advantage over competitors when analytics and data interpretation is done correctly (Akter et al., 2019).

However, the quantity of information collected by organizations is so large which make it sometimes difficult to manage and obtain conclusive results. These results favor for the implementation of corporate strategies, decision making, innovation or the improvement of user experience (Dudycz, et al., 2019).

The benefits of extracting data, analyzing them and obtaining the so-called insights have a very significant impact on many areas and departments of companies, both large and SMEs (Saura et al., 2021). In contrast, either for reasons of ignorance, or little interest, data analysis still does not have the consideration it requires in the daily tasks and strategies of organizations (Camargo et al., 2018).

Understanding consumer needs and transmitting correct message to the right people is one of the main tasks of Marketing, a simple but at the same time quite complex task. Consumers' tastes, interests, needs and concerns are constantly changing, closely linked to the aforementioned VUCA ecosystem in which the society is living (Saura et al., 2019). Through data analysis it is possible to obtain insights and make better strategic decisions focusing on the consumer as the main target, an important feature of the so-called Marketing Intelligence (Lies, 2019).

It is through social networks, smart devices and other devices where most users provide a large amount of data and expose personal information such as their interests or location (Anshari et al, 2019). From a business point of view, these channels are key to be able to keep up with what to offer, how to offer it and especially how to improve consumers' lives in a more personalized way (Zhang et al., 2019)

Users are spending more and more time on the Internet, shopping online, but above all using social networks as channel of interaction with friends, family and even with the brands (Kang and Yang, 2021). Through these channels, it is possible to analyze and better understand customers or potential customers based on two important drivers: User-Generated Content (UGC) (Saura et al., 2019) and User-Generated Data (UGD). According to some studies, these concepts are key to the development of advanced digital marketing strategies, therefore this explains the importance of effective data analysis (Saura, 2020).

As technology advances, new methods, techniques, or processes focused on data analysis such as machine learning or data mining appear (Gutnik, 2021). This is a challenge for companies, who should understand what the type of data most useful and which techniques are the most effective according to the companies' objectives and products/services offered (Akter et al., 2019). However, overcoming this barrier is decisive, for example for the optimization of resources, content personalization and for the creation of just-in-time strategies to differentiate themselves from the competition, hence the importance of studying this topic.

The main gap that this chapter aims to cover is to provide contrasted and relevant information on the main techniques used in data analysis in digital environments, as well as the most relevant indicators, metrics or concepts that play a determining role in companies.

The chapter will be developed in the form of a Systematic Literature Review and will follow the following structure: In the second section, a theoretical framework will be developed where the relationship

between Big Data Analytics (BDA) and Marketing Analytics (MA) in digital business will be explained based on the contributions of other authors. Then, the methodology will be carried out using PRISMA approach. Then, the results will be analyzed and the chapter will end with a conclusion where theoretical and practical implications will be provided.

## **THEORETICAL FRAMEWORK**

### **The Importance of Big Data Analytics and Marketing Analytics in Digital Business**

As mentioned above, data represents an essential source of information in companies, and even in governments and other institutions (Löfgren and Webster, 2020). Big Data (BD) does not only refer to a massive amount of data, but it is also a concept that relates to the difficulties, challenges, capabilities and/or skills related to its management and processing to obtain meaningful information (Dina Darwish, 2020).

According to Chandarana and Vijayalakshmi (2014), the importance of understanding the characteristics and nature of big data allows for better analytics, and therefore better results or insights. These authors state that big data is characterized by (i) volume, (ii) velocity, (iii) variety, (iv) veracity and (v) value. However, other studies suggest that these same characteristics are in turn big data challenges (Hajjaji et al., 2021).

More and more companies are seeking to understand big data in depth in order to overcome these barriers that hinder the clear understanding of the data, hence the importance of Big data analytics. One of the main benefits of big data analytics in companies lies in the creation of Competitive Intelligence (CI) (Ranjan and Foropon, 2021). Moreover, according to Gupta (2018), big data analytics represents a key factor in organizations to acquire a greater competitive advantage and obtain a better positioning in consumers' mind.

On the other hand, Big Data Analytics serves as a starting point in companies to be able to establish processes, develop strategies and make decisions according to business objectives, thus developing the Competitive intelligence mentioned above (Ranjan and Foropon, 2021).

It is in this context, the concept of digital marketing is becoming broader due to the constant implementation and advancement of new technologies such as IoT, Smart technologies or Artificial Intelligence among others (Herhausen, 2020). Digital marketing is no longer only considered as a strategy or means of communication, but it is also used as a tool for obtaining user data, which is often more profitable than a simple purchase (Polanco-Diges and Debasa, 2020). This is where Marketing Analytics comes into play.

It is a fact that big data serves as a digital marketing support for the implementation of strategies and new ways of marketing in digital ecosystems. Therefore, the concept of marketing analytics gets a great prominence to achieve greater efficiency and profitability in the practices that are carried out especially in the marketing department and other areas of the organization (Wedel and Kannan, 2016).

Through the strategies implemented in online ecosystems such as social networks, e-commerce or websites, companies collect a large amount of information from their customers or potential customers. Based on this information, future strategies will be oriented according to the results obtained, all done in a more accurate, consistent and most importantly in a more consumer-centric way (Saura et al., 2017). This is where the importance between digital marketing and marketing analytics lies.



According to Wedel and Kannan (2016), marketing analytics objective is the collection, management and analysis of data to obtain insights, maximize effectively the resources and optimize Return on Investment (ROI). In these processes intervene different techniques such as Natural Learning Processing (NLP), Sentiment analysis (SA) o Machine Learning approaches (ML) among others (Saura, 2020; Sheth, 2021). As well as key performance indicators in marketing strategies (Saura et al., 2021). Moreover, it is refered terms like User Generated Content (UGC), User Generated Data (UGD), electronic Word of Mouth (e-WoM) o data privacy (Gutierrez et al., 2019; Saura, 2020; Karegar et al., 2020; Sarin, 2021).

In this way, the main objective is to identify and categorize the main strategies, metrics and data-driven oriented concepts, as well as their classification according to the relationship between Big Data Analytics and Marketing Analytics in order to acquire a better understanding. The originality of the study lies in how the results are presented, not having been studied in this way before. This chapter is presented as a Systematic Literature Review where the results will be interpreted in an exploratory way and will answer the following Research Question: *What is the relationship between Big Data Analytics and Marketing Analytics?*

## **METHODOLOGY**

### **Data Extraction**

The methodology used is a Systematic Literature Review (SLR), whose main objective is to be able to answer the research question formulated above. The SLR approach consists of identifying and synthesizing the contributions of other authors that are sufficiently conclusive (Snyder, 2019). For this, we followed the systematic sequential process proposed by vom Brocke et al. (2009) and vom Brocke et al. (2015). Finally, PRISMA statement will be applied to facilitate the preparation of the literature review (Moher et al., 2015).

Three important databases were used to search for articles and research: Web os Science, Scopus and Science Direct. The searches were performed following a similar structure proposed by Saura, (2020). First, the key terms for our research were identified, then the databases were searched. For greater precision of the results, the searches were filtered by collecting only those articles whose search terms appeared in the title, abstract or/and keywords. In addition, only research considered as scientific articles was taken into account. Tables 1 and 2 provide more details on the search terms used in the SLR process and the results obtained from the databases.

*Table 1. Terms used in the databases*

<b>Database</b>	<b>Searched terms</b>			<b>Fields</b>
Web Of Science	Big Data Analytics	AND	Marketing Analycis	Title
Scopus	Business Analytics	OR	Digital Marketing	Abstract
Science Direct				Keywords

Source: Self-elaboration

## A Better Understanding of Big Data and Marketing Analytics

Table 2. Number of article classifications by results

Database	Number of results	Number of relevant results - 2°
Web of Sciences	126	13
ScienceDirect	64	2
IEEE Explore	48	3
Total	238	18

Source: Self-elaboration

In the SLR process, it has been followed the guidelines described in previous studies, such as vom Brocke et al. (2015) presenting an SLR through the PRISMA diagram (Moher et al. 2015). Figure 1 shows the steps that were followed to extract the most relevant articles according to the object of this study, some articles were excluded as they did not contain search terms or on the other hand, those found were not related to the present study (vom Brocke, 2015).

Figure 1. The SLR process

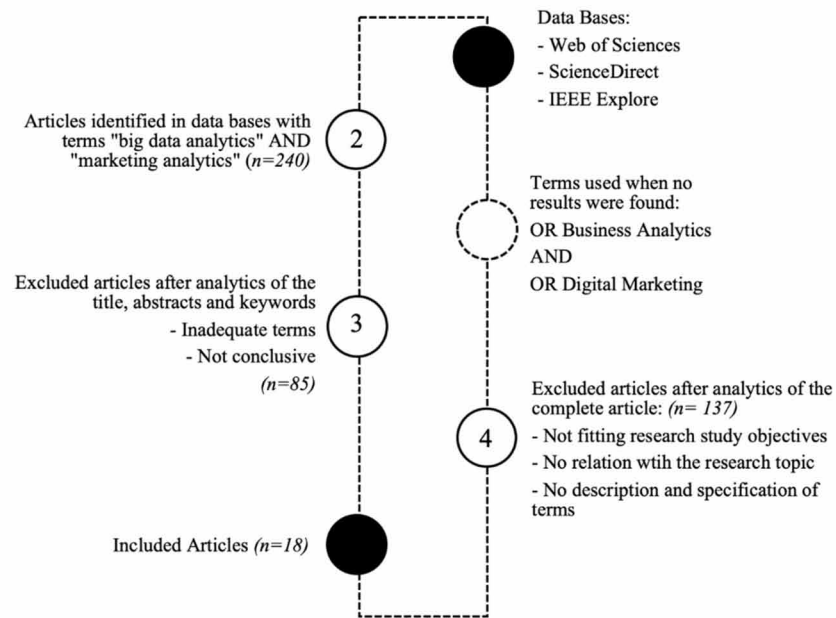


Table 3 shows the total number of items identified according to the search parameters of the SLR process (Saura, 2020).

*Table 3. Results of the SLR*

<b>Authors</b>	<b>Journal</b>	<b>Category</b>
Hallikainen et al. (2020)	<i>Industrial Marketing Management</i>	Marketing
Choi et al. (2018)	<i>Production and Operations Management</i>	Management of Technology and Innovation
Xu et al. (2016)	<i>Journal of Business Research</i>	Marketing
Erevelles et al. (2016)	<i>Journal of business research</i>	Marketing
Benoit et al. (2020)	<i>Journal of Marketing Management</i>	Strategy and Management
Liao et al. (2019)	<i>Asia Pacific Journal of Marketing and Logistics</i>	Business and International Management
Ducange et al. (2018)	<i>Soft Computing</i>	Software
Mariani et al. (2020)	<i>Journal of Business Research</i>	Marketing
Sivarajah et al. (2020)	Industrial Marketing Management	Marketing
Dong and Yang (2020)	<i>Information &amp; Management</i>	Management Information Systems
Indrakumari et al. (2020)	<i>Advances in Computers</i>	Computer Science (miscellaneous)
Ciampi et al. (2021)	<i>Journal of Business Research</i>	Marketing
Buhalis and Volchek (2021)	<i>International Journal of Information Management</i>	Marketing
Xu et al. (2016)	<i>Journal of Business Research</i>	Marketing
Saidali et al. (2019)	Procedia Manufacturing	Artificial Intelligence
Lamberti et al. (2017)	IEEE Transactions on Industrial Informatics	Information Systems
Mohamed and Weber (2020)	<i>2020 IEEE International Conference on Engineering, Technology and Innovation (ICE/ITMC)</i>	Computer Science
Ekka and Jayapandian (2020)	<i>2020 International Conference on Electronics and Sustainable Communication Systems (ICESC),</i>	Computer Science

Source: Self-elaboration

## **ANALYSIS OF THE RESULTS**

Following the methodology, it has identified the most frequent key terms used in each of the articles found, which have been defined in Table 4.

Each of these terms are related to the search keywords “Big Data Analytics” and “Marketing Analytics”. However, some present a more marketing-focused approach and others on data science itself.

Thus, in Table 5 we have listed terms with a more data science-oriented focus and those that have a more direct application in digital marketing and ecommerce. However, due to the relationship that exists between the two we could conclude that the results belonging to Big Data Analytics are the first step to obtain the Marketing Analytics terms.

Once this classification has been made, Table 6 classifies each of these terms belonging to Big Data Analytics in different categories: Techniques, systems and technology.

In Table 7, the terms included in Marketing Analytics have also been categorized but this time as follows: Software, metrics/KPIs, strategies and concepts.

## A Better Understanding of Big Data and Marketing Analytics

Table 4. Key terms definition

Key terms	Definition
Artificial Intelligence (AI)	Technology that is able to mimic human functions based on a large amount of massive data and through a series of intelligent algorithms that are able to automatically learn patterns of behavior.
Cloud Computing	It consists of the provision of services on the Internet. Information, data, processes, servers or software are stored in the cloud, where everyone can access them without the need for large infrastructures.
Customer Relationship Management (CRM)	It consists of the continuous management of a portfolio of customers through the influence of big data analytics in order to build and maintain customer relationships to maximize profits.
Data Mining (DM)	It is the process of extracting insights to solve a defined problem.
ERP (Enterprise Resource Planning)	It is a combination of systems that allow the integration of different business operations (logistics, production, finance...) which share the same database.
Facial Recognition	The process by which it is possible to identify or verify a person's identity using biometric technology. It is a process of comparison and analysis of people's facial features.
Geographic Information Systems (GIS)	Information system that integrates massive measurable data in a global context.
Global Positioning System (GPS)	It is a navigation system that allows knowing the location of any object or person by means of the signals emitted by satellites.
Machine Learning (ML)	It is considered a method within Artificial Intelligence (AI) that deals with the development and evaluation of algorithms for the extraction of patterns in a large dataset.
Marketing Attribution or Multi-touch attribution	Marketing practice that consists of analyzing consumer touchpoints during their customer journey to identify which tactics are most cost-effective in achieving the company's goals.
Marketing Behavior	Marketing strategy that relies on the specific behaviors and actions of consumers and users to make decisions.
Marketing Intelligence	Refers to the extraction, understanding and analysis of data in which the marketing department is involved.
Marketing Performance Measurement	Term used to describe the analysis and improvement of the effectiveness and efficiency of marketing based on the correct alignment of activities, metrics and strategies with business objectives.
Marketing Touchpoint	Touch points where a potential customer or potential client has some kind of interaction with the brand.
Mobile Computing	The technology that allows the transmission of data, voice and video through wireless devices without the need to be physically connected.
Natural Language Processing (NLP)	Discipline based on Artificial Intelligence that is in charge of understanding, interpreting and manipulating human language.
NoSQL	Databases that work with unstructured databases and do not address scalability and performance issues of big data.
Online Consumer Reviews (OCR)	Refers to the evaluations and opinions left by users in an online ecosystem about products, services, or brands.
Pay-Per-Click (PPC)	It is an online advertising model whereby the advertiser pays a certain amount of money each time a person accesses a certain website through that advertising link.
Product Lifecycle Cycle (PLC)	Refers to the different cycles or phases that sales of a given product undergo during the time it remains on the market.
Return On Investment (ROI)	Metric used to evaluate the profitability of investments with respect to their cost.
Sentiment Mining (SM)	It consists of the use of NLP and computational linguistics to find and extract information about positive, negative or neutral feelings in a text.
Social Media Analytics (SMA)	It is the combination of different intelligent technologies such as machine learning, or natural language processing for the extraction of social big data.
Social Media Marketing (SMM)	A set of digital marketing strategies consisting of the use of social media channels to achieve the company's goals.
SQL	Programming language that works with structured data and allows faster and easier manipulation of elements in databases.
Text Mining (TM)	A set of techniques that consists of the exploration of large amounts of text data with the objective of discovering patterns or trends that explain behaviors in a text.
User-Generated Content (UGC)	It is the content generated by the user on social networks or other digital platforms. The content can be distributed through comments, videos, opinions, reviews...

Source: Self-elaboration

*Table 5. Classification of terms in big data analytics and marketing analytics.*

<b>Big Data Analytics</b>	<b>Marketing Analytics</b>
Artificial Intelligence (AI)	Marketing Performance Measurement
Cloud Computing	Return On Investment (ROI)
Data Mining (DM)	Product Lifecycle Cycle (PLC)
Facial Recognition	Social Media Marketing (SMM)
Geographic Information Systems (GIS)	Enterprise Resource Planning (ERP)
Global Positioning System (GPS)	Social Media Analytics (SMA)
Machine Learning (ML)	Customer Relationship Management (CRM)
Mobile Computing	Marketing Intelligence
Natural Language Processing (NLP)	Marketing Behavior
NoSQL	Marketing Touchpoint
Sentiment Mining (SM)	Marketing Attribution or Multi-touch attribution
SQL	User-Generated Content (UGC)
Text Mining (TM)	Online Consumer Reviews (OCR)

Source: Self-elaboration

*Table 6. Categorization of big data analytics terms*

<b>Techniques</b>	<b>Systems</b>	<b>Technology</b>
Data Mining (DM)	Geographic Information Systems (GIS)	Artificial Intelligence (AI)
Machine Learning (ML)	Global Positioning System (GPS)	Facial Recognition
Natural Language Processing (NLP)	NoSQL	Mobile Computing
Sentiment Mining (SM)	SQL	Cloud Computing
Text Mining (TM)		

Source: Self-elaboration

*Table 7. Categorization of marketing analytics terms*

<b>Software</b>	<b>Metrics/KPIs</b>	<b>Strategies</b>	<b>Concepts</b>
Enterprise Resource Planning (ERP)	Marketing Performance Measurement	Social Media Marketing (SMM)	Marketing Behavior
Customer Relationship Management (CRM)	Return On Investment (ROI)	Social Media Analytics (SMA)	User-Generated Content (UGC)
Marketing Intelligence	Marketing Touchpoint	Marketing Attribution or Multi-touch attribution	Online Consumer Reviews (OCR)
	Product Life Cycle (PLC)		

Source: Self-elaboration

## **DISCUSSION**

The study compiles information from other authors by classifying and organizing it in a clearer and more understandable way. In this way, the study is based on the results of others research that have already been approved by the academy.

However, it is identified terms that have appeared less frequently showing relationship between BDA and MA, such as the term Pay-Per-Click (PPC). The authors Xu and Ramírez (2016) state that big data analytics plays an important role in online advertising strategies, since it is possible to obtain actionable information to improve advertising investments.

On the other hand, Buhalis and Volchek (2021) consider that the Geographic Positioning System (GPS), allows to know the location of customers and their activities. Its relationship with Big Data Analytics provides more detailed information about users in order to be able to carry out more personalized digital marketing strategies depending on the location where they are. In addition, the combined use of GPS and GIS may be useful to identify virtual market zones (Ducange et al., 2017).

Regarding the results of the study, Liao and Hsu (2019), consider that the application of big data analytics in Social Media Marketing provides very relevant and accurate information about users' motivations, interests, opinions. Thus, they state that marketers can develop strategies and make decisions based on the results obtained from big data analytics when applied in social media marketing.

Mariani and Fosso (2020) explain that OCR together with big data analytics has a great relevance to predict market potential or demand in digital networks such as social media or review platforms. This is where specific Big Data Analytics techniques come into play such as Natural Language Processing (NLP) that could in turn help to understand and comprehend the use of human language in these types of channels (Ducange and Mezzina, 2018).

Moreover, according to Xu et al., (2016), Text Mining, Sentiment Mining, and Data Mining techniques, which are important areas of BDA, are techniques that when they are applied in marketing strategies are very useful tools for today's managers.

In this context, the term UGC mentioned Dong and Yang (2020) could be studied and analyzed with these techniques to identify and understand the preferences, interests or feelings that consumers have regarding a brand, product or service.

## **CONCLUSION**

This chapter provides an overview of the current state of the theoretical and empirical literature on Big Data Analytics and Marketing Analytics. The continued development and growth of the Internet, e-commerce and big data imply a shift in the paradigm and thinking of marketing practices, as traditional parameters have had to evolve to new digital marketing techniques, performance analysis and measurement processes.

In this systematic literature review, 26 key terms have been identified. Subsequently, these have been classified, on the one hand, terms related to Big Data Analytics and on the other hand, to Marketing Analytics.

Firstly, Big Data Analytics results have been specifically classified according to; techniques, systems and technology. Secondly, the results related to Marketing Analytics have been grouped between; Softwares, metrics/KPIs, strategies and concepts.

Based on these results and responding to the main research objectives, it has been obtained through our results 13 key terms about Big Data Analytics. Through our classification it has been able to distinguish between; 5 techniques, 4 systems and 4 technology.

On the other hand, based on the 13 results on Marketing Analytics, the results obtaining at the end have been classify into; 3 software, 4 Metrics/KPIs, 3 Strategies and 3 Concepts.

The results obtained make it possible to answer the Research Question formulated at the beginning of the research: What is the relationship between Big Data Analytics and Marketing Analytics?

In an exploratory way we could say that Big Data Analytics and Marketing Analytics have a strong common ground. Both concepts share data analytics as the main engine for obtaining insights, however, in the case of Marketing Analytics it has a much more specific and determined application since it is oriented to achieve specific objectives, and it is less complex with respect to Big Data Analytics.

Until now, Big Data Analytics techniques, technologies or systems (table 6) are not used as a fundamental axis in digital marketing strategies, however, they rely on them in their simplest form to improve their (i) strategies, (ii) to evaluate their metrics, (iii) to understand new concepts such as UGC or (iv) to incorporate them into software that serve as daily management tools as in the case of CRM (see table 7).

## **Theoretical Implications**

The results obtained from the research might help the academia to understand, categorize and study the concepts related to BDA and MA in a different way. Thus, as new terms appear, as technology advances, and as new systems, techniques or strategies are created, the categorization developed in this study (table 4, 5, 6 and 7) would be updated and completed in parallel.

## **Practical Implications**

The results will help future studies on data analysis focused on company strategies to improve their marketing processes. From the applied perspective, the results of this study can be useful for communication agencies, digital marketing agencies, traditional companies and people who want to apply new techniques, key concepts, strategies and much more in their marketing actions.

The present study classifies concepts between data mining and data analysis with a directly related focus on marketing. The results of this study can be used by companies to improve their digital marketing actions by analyzing the different strategies and actions that can be carried out. This will avoid creating generic actions by companies in order to perform specific marketing strategies related to data analysis.

The increasing use of data mining strategies prior to marketing actions is linked to the development and advances in technology. The rapid evolution of new data mining techniques and methods is leading to new demands from companies and researchers.

The results of this study are key to new business models in research and development areas, and it contributes to the effort to categorize metrics, techniques and applications of big data and marketing. Going forward, this study will help researchers in both business research areas and technology sectors related to big data and digital marketing.

## **Limitations and Future Research**

In relation to the limitations of the study, the authors have found the classification of the terms into categories to be complex, since there is no accurate and common classification for each term. This, each author interprets and classifies them in the way that best interests him or her, depending on the research approach or subject matter addressed.

On the other hand, other terms have been identified in the results, which have appeared less frequently, and we consider of great interest for future research and thus improve and complete the studies of this topic for academia and practitioners.

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## Chapter 2

# The Role of Big Data in Digital Marketing

**Neslihan Cavlak**

*Namık Kemal University, Turkey*

**Ruziye Cop**

*Bolu İzzet Baysal University, Turkey*

### **ABSTRACT**

*Consumers perform their activities through digital channels more often as a result of technological advancements where those advancements also allow marketers to reach excessive information about consumers, store them, and use them whenever and however they consider necessary. These big data provide businesses to understand the unmet demands and expectations of consumers and achieve a sustainable business success. Despite the importance of big data analytics for marketing of businesses, research on this issue is scarce. In order to contribute the literature, the purpose of this chapter is to reveal the importance of big data in the digital marketing environment. In line with this purpose, a comprehensive literature review including the definition, components, sources of big data, and the role of big data in digital environments and the examples of businesses using big data is undertaken.*

### **INTRODUCTION**

With the Internet and digital media coming into our lives, the way businesses operate has radically changed. More than 3 billion people in the world regularly use the Internet to search for products, enjoy themselves, and find friends (Chaffey, 2019: 6). Consumers spend a large part of their lives in the digital environment and mostly benefit from it, which causes both consumer behavior and marketing methods of businesses to undergo a major change (Chaffey, 2019: 6). The development in digital technologies causes the marketing activities of businesses, which aim to gain a competitive advantage by meeting the demands and expectations of consumers and by complying with the present conditions, to transform each day. From desktop to laptops to smart phones and tablet devices, there are technological platforms that

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consumers can easily use. The digital environment offers product, service, and price options of different suppliers to customers, and provides them with a faster and an easier way to buy.

The increasing number of technological tools and the ability to perform operations, which normally require different devices, using a single device in time has enabled new ways of marketing on the Internet. In this way, a new user-centered, more measurable, global, and interactive digital marketing concept has emerged (Piñeiro-Otero and Martínez-Rolán, 2016: 38). Digitalization of almost every aspect of business operations today leads businesses to take action in order to create a sustainable value, increase business performance, and gain competitive advantage by making use of big data and analytical tools (Wamba et al., 2017: 357). With digital transformation, consumers are benefiting from more and more digital tools. All kinds of operations performed by consumers using these tools are registered and stored. Datasets, which are obtained through combination of the data that come from sensors and the Internet of Things and created on web sites, social media, and mobile platforms and the data within the body of operations, have created the “big data” concept (Chen et al, 2014: 321). Big data indicates massive amounts of data that have reached a greater audience thanks to the increasing number of operations performed by consumers in the digital environment. As the volume of the data increased, the marketers started to use not only the traditional operation data, but also advanced statistical modeling techniques developed to analyze the data that are getting more and more complicated, including unstructured data such as images, conversations, pictures, audios, and videos obtained from digital and social media (Erevelles et al, 2016: 898). Social networks such as Facebook and Twitter have a great impact on customer decisions and that’s why the leading businesses and brands endeavor to include information obtained from these platforms into their marketing solutions (Moro et al., 2016: 3344; Amado et al., 2018: 2). The utility of big data enables marketing tools to work in a stronger and a more innovative way (Grishikashvili and Meadows, 2014: 27). Successful businesses regularly analyze their customer service records. Since businesses always monitor the marketing environment, they are able to collect data regarding consumer sensitivity to products and brands.

With the developments in big data, traditional marketing strategies are changing day by day (Fu et al., 2020: 515). In the recent years, the use of data sciences, which makes it easier for businesses to reach information through massive data clusters they obtain from the digital marketing environment and to create decidable and actionable insight, has significantly increased (Saura, 2020). As new technologies, channels, and consumption patterns become widespread, it gets more complicated to understand modern consumer behavior. Also technological developments enable marketers to reach rich consumption data with greater volume, velocity, and variety. These rich and new information resources (Big Data) allow marketers to notice some elements they missed out or could not understand regarding consumer behavior. As the data become richer, marketers are able to notice new gaps better and develop various approaches to consumer behavior (Erevelles et al, 2016:900). Consumers live in a digital world where the data is abundant and rapid technological advancements are experienced. The ease of accessing digitally sourced data and the availability of advanced technology that can analyze this data lead many industries to digital transformation. Many global businesses recognize the potential of big data and believe that analyzing big data clusters can increase competitiveness of businesses and help them shape their marketing strategy decisions (Grishikashvili and Meadows, 2014: 26; Saura, 2021: 92). In the big data environment, businesses can access to all kinds of information about their customers. Businesses can monitor the changes in customer behavior and learn the reasons for those changes by monitoring customer data in detail. Big data allows businesses to improve their operations, develop better pricing strategies, evaluate customer feedbacks more quickly, and increase productivity and efficiency through cost reduction (Lee, 2017:

300). In short, technology enables proper access to customer data, a better focus on customer relations, and improvement of customer relations management (CRM) opportunities.

Today, although big data has become one of the most important developments in the field of digital marketing and data processing, studies on this subject are limited. To bridge this gap in the literature, this book chapter aims to reveal the importance of big data in the digital marketing environment.

Some studies reveal the importance of using big data in digital marketing. For example; Camilleri (2020), presents that the data-driven technologies can transform the businesses' into customer-centric marketing. (Wamba et al., 2015; Sivarajah et al., 2020) states that; big data and social media analytics in a participatory web environment make the business more profitable and remain sustainable through strategic operations and marketing related business activities. Saura (2021), defines the methods of analysis, their uses and performance metrics based on data sciences as used in the strategies and techniques of digital marketing. (Sharma et al., 2014), discusses the potential of data and analytics to create value in their study. Businesses can create value through the use of big data and business analytics (Gillon et al., 2014; Mithas et al, 2013). As can be seen, the studies discourse the benefits of big data, but do not reveal the big data issue in detail in the marketing literature.

The purpose of this study is, to reveal the importance of big data in the digital marketing environment. In line with this purpose, the definition, components, and sources of big data are reviewed in the first part of the study while the second part is focused on the digital marketing concept. The role of big data in digital environments is discussed in the third part and the fourth part includes examples of businesses using big data in the digital environment. The analysis in this study is, based on secondary sources of data primarily scholarly articles, news articles and survey reports and social media. The researchers made a literature review and interviewed with the experts in the field for their insights on usage and implications of Big Data.

## **BIG DATA**

With the technological advancements, consumers are performing all kinds of activities using more and more digital channels, which allows businesses to reach plenty of information about consumers, store that information, and use it whenever and however they deem necessary. Today, it is almost impossible to reach customers through classic marketing methods. This is mostly because of these methods fail to discover customer demands and expectations and to reach adequate information about them. In today's business environment, where the competition is quite strong, businesses mostly need to make much better speculations and decisions. That is why analyzing the market properly is of great importance to the future of businesses.

Today, businesses can easily get all kinds of information about consumers from different sources. Businesses can reach structured data (such as customer relations management) from traditional databases that belong to their customers or unstructured data (such as video, text, image, e-mail) obtained from new communication technologies and user platforms (Lansley and Longley, 2016: 271). While structured data is the data that can be obtained, processed, stored, and analyzed by businesses, unstructured data is the data that is really challenging to obtain and process (Balducci and Marinova, 2018: 585). The use of structured data is quite easy. Collecting and analyzing unstructured data enables businesses to gain competitive advantage, increases efficiency, and helps create innovations (Eberendu, 2016: 50). The increase in consumers' social media usage, online shopping, and the use of databases such as customer

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loyalty offers businesses new opportunities to measure and model consumer behavior (Lansley and Longley, 2016: 271). It leads to an increase in the data sources of businesses and allows them to reach plenty of information about consumers.

Big data can be defined in many ways. Manyika et al., (2011: 3) defines big data as datasets in such volumes that are impossible for general database software tools to reach, store, manage, and analyze. Big data is regarded as massive amounts of information clusters that provide data about consumers with the help of sources like social network posts, geotagging, and sensor outputs (Johnson, 2012: 21). As e-commerce becomes widespread, the effect of consumers' online research on their decision making process regarding consumer behavior is gradually drawing attention of more businesses (Neirotti et al., 2016: 1133). The eye-tracking sensor technology, which is constantly improving these days, provides businesses with different insights regarding the online shopping process of consumers. Analyzing the data obtained from sensors that record consumer activities during online shopping, it is possible to customize web pages, send personal advertisements, and perform marketing activities accordingly (Fu et al., 2020: 515). With the technological advancements, businesses have less face-to-face contact with consumers but are getting more and more information about them each passing day by carefully analyzing big data clusters.

While businesses used to serve consumer demands and expectations in the past based on the databases they designed themselves, all the digital tools consumers use today provide businesses with detailed information about them. Today, almost 70% of marketing survey data of businesses is obtained from online platforms while nearly 15% of them are collected through mobile phone surveys (Hair and Sarstedt, 2021: 2). A proper analysis of these data is very important for businesses to achieve a sustainable success.

Thanks to data, clear consumer insight can be gained and turned into a market advantage. Analytics indicates the tools that help analyze the data and discover the hidden elements (Erevelles et al. 2016: 897). Today, businesses are able to get much more data. In order to fully understand the unmet demands and expectations of consumers and to increase the profit of the business, it is necessary to benefit from big data and analyze it carefully (Erevelles et al. 2016: 899). Using big data, as many other new information technologies, businesses aim to reduce operational costs, make important improvements when necessary, and discover the elements required to develop new products (Davenport and Dyché, 2013: 3). Making use of new information technologies to the full extent can be quite beneficial to businesses in giving the best decisions in the digital age.

The digital data and the techniques used to analyze them have created a great revolution and transformation in marketing research. Massive amounts of data offer countless opportunities to marketing research teams to speculate and explain consumer behavior better (Hair and Sarstedt, 2021: 1). Before making strategic decisions, businesses should internalize those massive amounts of data they have by adopting different perspectives and then analyze them. The rise of such big data obtained from digital channels provides businesses with detailed information about the lifestyles, activities, and behavior patterns of consumers, which gives businesses a chance to analyze the data for various types of modeling (Wamba et al., 2017: 357). 2021 statistics indicate that 4.66 billion people worldwide use the Internet and 4.20 billion people use social media (<https://datareportal.com/reports/digital-2021-global-overview-report>). The use of the Internet and social media is increasing day by day. People spend approximately 7 hours a day on the Internet (<https://datareportal.com/reports/digital-2021-global-overview-report>). This is a clear proof that the Internet is an indispensable element of people's lives.

Consumers share many positive or negative feelings and thoughts about businesses and products on forums, social media networks, and various platforms (Abbasi et al., 2016). This offers businesses a



chance to learn users' opinions on many issues. Consumers usually want to have different and notable shopping experiences. Thanks to these platforms, businesses that want their customers to have unique experiences can reach information about them and follow strategies accordingly. Businesses that adopt a customer-oriented approach are collecting and analyzing more and more data they obtain from various sources to improve the efficiency of their operations (Côte-Real et al., 2017: 379). As long as they are supported with the right technologies and organizational resources, massive amounts of data can provide positive insight and a competitive advantage (Morabito, 2015). The leading technology companies such as IBM and Hewlett-Packard make great investments in big data (Barton and Court, 2012: 79). The primary reason for businesses to use big data is that it has the potential to change the operation of businesses significantly (Wamba et al., 2015: 234). Businesses that benefit from data analysis to the full extent and use it for their operations can increase their efficiency by 5% and their profitability by 6% (Barton and Court, 2012: 79). That is why most businesses invest in data analysis.

Big data and the developments in data analysis contribute a lot to the efficiency of businesses' communication with their target customers. Classifying customers by their demographic structures and implementing marketing strategies according to the demographic structure of customers are marketing strategies adopted by businesses. It is known that age and sex characteristics have a significant effect on consumption behavior and that is why analyzing the information in datasets about these characteristics of consumers is very important to marketers (Lansley and Longley, 2016: 271). Businesses, on the other hand, mostly benefit from geographic datasets as a way to understand and classify customers (Lansley and Longley, 2016: 271). Such information enables businesses to work more effectively and productively on marketing activities.

Data is now created and collected in much larger volume and velocity than ever in almost each area such as management, health, engineering, and education (Duan and Xiong, 2015: 1, Côte-Real, et al., 2017: 379). Due to its operational and strategic potentials, proper analysis of big data is considered one of the most important elements that increase business productivity and efficiency (Wamba et al., 2017: 357). There is a positive relation between big data practice and company performance (Germann et al., 2014), and big data analysis adds value to businesses (Sharma et al., 2014: 433). This is mostly because businesses that perform big data analysis acknowledge themselves and the market, and develop strategies accordingly.

There are five main components of big data platform. These are variety, velocity, volume, verification, and value. Big data must be handled with an integrated perspective based on these five components.

Variety: The source of big data involves variety and abundance. Data can be structured, semi-structured, and unstructured. The examples of structured data are browser or sensor data, records, files, and databases while unstructured data can be text data, videos, images, and audio records (Erevelles et al, 2016: 898; Jin et al., 2015: 59). Most of unstructured data is collected from social media where individuals mostly share their information with their friends and family (Erevelles et al, 2016: 898). Collecting, storing, and analyzing such data is quite challenging.

Since it involves various types and structures of data, it can be very difficult to process (Zhou et al., 2014: 62). In order to process the variety of data, different methods and techniques should be adopted. Structured and unstructured data variety might result in heterogeneousness, experimental diversity, and statistical prejudice in data process (Wang et al., 2016: 104). While electronic tables and databases were the only sources of data in the past, there are many data sources today such as e-mail, photograph, video, tracking device, PDF, and audio recording.

## ***The Role of Big Data in Digital Marketing***

For instance; Procter & Gamble performs big data analysis in order to increase its operational performance by bringing together more than 100 specialists who can make supply chain, marketing, sales, and consumer behavior analyses (Davenport, 2006: 4). Tata Motors analyzes more than 4 million text messages each month including customer complaints, appointments, customer comments on new products, and customer satisfaction surveys (Agarwal and Weill, 2012: 35).

**Volume:** Volume refers to the size of data created by systems or tools per second (Zhou et al., 2014: 62). As the name suggests, big data is the information that involves multidimensional data fields and is created from various sources and formats. The Internet plays a major role in people's lives. Sharing content, sending messages, commenting, and liking shared posts; people take a very active part on social media. Being in constant progress all day long, this cycle creates datasets that are too big for traditional databases to store. As more people use computers, data is gaining more volume day by day.

More than 2.5 quintillion bytes of data are created every day in the world (Alani, 2021: 1). While 95 million photographs and videos are posted on Instagram daily, 510,000 comments and 293,000 status texts are shared by Facebook users per hour (<https://www.forbes.com/sites/bernardmarr/2018/05/21/how-much-data-do-we-create-every-day-the-mind-blowing-stats-everyone-should-read/?sh=7a63738760ba>). With the other communication platforms including Snapchat, LinkedIn, YouTube, and Twitter, the volume of data created in a day, or a second worldwide can be extremely large.

**Velocity:** Another dimension of big data is the continuity of data creation speed (Erevelles et al, 2016: 898). The crucial element in data velocity is the rate of data flow speed (Lycett, 2013: 381). Today, the velocity of data production is quite high and it is getting higher day by day. Sharing contents and their feelings and thoughts about almost everything on various platforms, social media users create data at a very high speed (Harrigan et al., 2021: 2). In short, data that are obtained from each field are changing and improving so fast.

Amazon is the leading of all businesses that benefit from big data. Using big data, Amazon launches new products, makes deals with new suppliers, delivers products on time, and has no trouble gaining new consumers (Davenport, 2006). Today, businesses can monitor consumers and analyze consumer behaviors by following online clickstream data (Wamba et al., 2015: 236). Analyzing clickstream data of consumers, businesses can reach a lot of information about them. Clickstream includes information about the timing and order of pages viewed by a customer. Making use of big data analysis, even small and medium sized enterprises (SMEs) can renew and improve their website design, develop effective sales techniques, and build personalized product offer systems (Gandomi and Haider, 2015: 138). Moreover, businesses can update the differences in customer behavior elaborately using data they obtain near real-time (Manyika et al., 2011). The products that are viewed, displayed, added to bag, removed from bag, bought, and returned by the customer can be followed by businesses instantly and easily.

**Veracity:** It refers to the quality and safety of data that are created and processed. The accuracy and safety of collected data are crucial. It might be impossible to check the quality and accuracy of vast amounts of data created each second. As the volume and size of data increase, so does the uncertainty. Therefore, it is of great importance to have a high level of safety and quality of data obtained from various sources (Wamba et al., 2015: 235). When it turns out that the collected data are not of sufficient quality compared to other data and information, the analyses of the business can be misleading, which has a negative effect on business success (White, 2012: 211). Thus, businesses must be careful with data quality. A research by IBM has revealed that poor data quality costs many USA-based businesses nearly 3.1 trillion dollars per year. However, almost 27% of the participants state that they are not so sure how much of data they think are of poor quality are inaccurate (Rubin and Lukoianova, 2013: 4).

Value: Value refers to the extent to which the outcomes of big data analysis contribute to value creation economically (Wamba et al., 2015: 236). Collecting, storing, and processing big data can create an important value for the world economy, increase the efficiency and competitive power of businesses, and create an economic value for consumers (Manyika et al., 2011: 1). While big data has only recently come into our lives as an extremely popular concept, many businesses are aware of the potential competitive advantage that the effective use of this collected and stored information offers to the business (White, 2012: 219).

As long as it is collected, stored, and analyzed properly, big data is an element that brings great benefits to businesses. With data that is of great volume and persistence, obtained from various sources, proved to be accurate and safe, and likely to create value, businesses can gain competitive advantage by developing strategies according to consumer demands and expectations.

## **DIGITAL MARKETING**

Performing all kinds of activities through digital channels today causes businesses to experience data explosion. To understand the effects of marketing activities, businesses are caring about data analysis and digital marketing more than ever. Digital marketing involves many channels that do not require the Internet including cell phone text messages, digital advertising, and digital media (Yasmin et al., 2015: 69). Digital marketing is considered as the means of achieving marketing goals by businesses using digital technology.

Digital marketing can be defined as the use of any digital technology to make marketing process easier along with the ultimate aim of customer interaction, participation, and evaluation. Using digital marketing strategies, businesses have an interactive and attended experience with consumers (Zahay, 2021: 125). Establishing an interactive communication with consumers through digital channels is the primary goal of digital marketing (Yasmin et al., 2015: 71). Creating value with consumers and other partners through digital channels and forming a constant communication and interaction with them are of great importance to businesses, which can offer new opportunities to businesses. Making effective and productive use of digital marketing can lead to the transformation of production and delivery policies and enable businesses to offer various consumption patterns (Munar and Jacobsen, 2013: 2).

Making use of data analysis and digital technologies can help businesses transform and expand the role and extent of their marketing activities (Shah and Murthi, 2021: 772). Performing data analysis helps businesses discover the effect of various marketing activities including sales development, delivery, price, product qualities, TV, and print ads on the market share, sales revenue, or the brand value of a product's brand. It leads businesses to become more customer-oriented and work harder to make them have notable experiences. Today, customer experience has replaced the concept of customer satisfaction which forms a basis for marketing (Sheth and Kellstadt, 2021: 781). Attaching as much importance as it takes to data analysis and benefiting from digital marketing techniques are the reasons why businesses still exist in the digitalizing world.

## **THE ROLE OF BIG DATA IN DIGITAL ENVIRONMENT**

People are living in a digital world where technology is advancing rapidly and data is becoming plentiful day by day. Today, information obtained by digital means has a major part in marketing research and activities. Integrating with the business life, technology causes marketing communication to become complicated. The solution to this problem is possible only when businesses analyze marketing performance in a detailed manner (Buhalis and Volchek, 2021: 1). Today, there are almost no industries on which big data analysis has not created a great effect.

The results of big data analysis can offer detailed information, feedback, and personalized advice to businesses about their operations in various sectors including health, tourism, commerce, and transportation (Benjelloun et al., 2015: 5). For example; tourism destinations, tourists, and tourism establishments create large volumes of data every day. Thanks to digital data analysis, tourism establishments are able to reach information about the demands, needs, expectations, and preferences of tourists, and make decisions to please them and offer them unique and notable experiences (Mariani et al., 2018: 3516). In the health sector, on the other hand, big data analysis provides businesses with detailed information to increase the efficiency and productivity of healthcare costs and services, reach more detailed information about diseases and patients, and offer a more personalized service to patients (Benjelloun et al., 2015: 1). Big data analysis also brings many benefits to the banking sector. The banks are able to provide their customers with better service, store a lot of information about them, take safety measures, and enable customers to perform all kinds of banking transactions through digital channels (Srivastava and Gopalkrishnan, 2015: 643). Using big data in agriculture brings many benefits to the industry. Big data analysis enables the review of production strategies, the adaptation of production plans to climate prediction, the evaluation of supply and demand based on the area and customer profiles, decision making according to climate prediction, and the evaluation of the results of smart receptors (Benjelloun et al., 2015: 3). As can be seen, big data analysis can help various businesses make decisions, develop strategies and policies, and increase their profit and competitive power.

Businesses can collect information from many digital channels. These are search engines, interactions on social media accounts that are constantly used, activities on electronic banking accounts, all kinds of interaction on the Internet including blogs, e-mails, sensors, and activities on e-government (Blazquez and Domenech, 2018: 101). Some data sources, on the other hand, are not intentionally created by consumers. These are the cookies on the Internet, the location data created by smart phones, GPS, call history and Bluetooth signals, and personal data created as a result of activities on the Internet pages (Wamba et al., 2017:339). These data are created by consumers in the digital environment and constantly updated. People are living in a digital era when everything is smart. The Internet, smart phones, and smart sensors are the essential elements of people's lives and that is why many businesses perform their marketing activities in digital environments (Blazquez and Domenech, 2018: 99). In order to collect various kinds of data so that they can develop strategies to prolong the lifespan of their products, businesses are benefiting from more and more sensors and wireless Internet (Kusiak, 2017: 23). Recording all kinds of activities performed by consumers on the Internet makes it easier for businesses to develop marketing strategies.

Any activity performed by consumers on the Internet can be subject to all kinds of measurement for marketing activities and consumer behavior analyses the businesses are planning to carry out. For example; each and every one of the shopping searches of consumers, the stores they visit, the products they buy, or have planned to buy but then change their minds about, and products they return is recorded as data and can be analyzed by businesses (Xie et al. 2016: 1037). While surfing the Internet, consumers can

leave several digital footprints (Blazquez and Domenech, 2018: 101). Businesses which monitor them meticulously are able to understand the consumer behavior, intent, demands, and expectations easily.

Today, marketers can access geographical data to map out the geographic mobility of consumers and thanks to this mapping, they can speculate on where consumers might be (Zheng et al., 2021: 1). It provides marketers with many advantages. On the one hand businesses are able to understand consumer behavior, but on the other hand they get the chance to carry out various marketing activities including offering ads or advice to consumers based on where they are or they will possibly be (Zheng et al., 2021: 1). Bringing together the real-time (such as geospatial) and vast amount of data (such as purchase history of consumers), businesses can reveal the consumer information that remained in the dark and understand consumer behavior better (Erevelles et al., 2016: 900). In order to increase the efficiency and productivity of their marketing activities, businesses must use their creativity and make innovations. However, it is not enough for them to gain competitive advantage over their competitors in the market. Businesses must benefit from big data to make innovations and radical decisions (Tellis et al., 2009: 3).

With the technological advancements, access to data is a lot easier and businesses' perspectives on data have changed. A constant increase and variation in data sources such as social media, sensors, and computerization of machines causes an increase in the amount of data. Reaching greater volumes of data enables businesses to obtain more information about them, which can allow them to adopt a more detailed and wider perspective on themselves (Barton and Court, 2012: 80). As the content of data becomes richer, marketers can detect new gaps and understand consumer behavior better (Erevelles et al., 2016: 900). Businesses can notice spots they have missed or overlooked before, offer different experiences to their customers, and develop various strategies (Barton and Court, 2012: 80). With their new marketing and management approaches they have developed from elements such as clickstream, web server logs, and social network relations, Google, eBay, LinkedIn, and Facebook are the businesses which have benefited from big data first (Davenport and Dyché, 2013: 2). Factors including technological advancements and constantly changing consumer demands and expectations cause modern marketing structure to become complex.

In the digital age, the way consumers access information, communicate others, reach the brand they like, and most importantly the way they purchase has changed and varied (Xu et al., 2016: 1563). This situation enables businesses to collect data about consumers on a very detailed or even individual level (Wooff and Anderson, 2015). Businesses can easily access all kinds of personal information including the channels visited by consumers, the duration, time, and frequency of their visit (Li and Kannan, 2014: 43), IP addresses of customers, their view history, keywords they use to search, the device and browser they use, the duration of their sessions, their location, education, gender, and age information (Ghose and Todri, 2015: 28). Big data allows businesses to evaluate consumers in various aspects. For instance, a business that launches a new product can develop some strategies by considering the effects of advertisements on purchase. It is obvious that the purchases of consumers, who are a lot more social today than ever, are inspired by a variety of factors. Thanks to tools that big data has provided us, we can easily analyze what consumers buy personally, where they have discovered the product they bought, and even how they are convinced to buy it.

Businesses can reach a lot of information through users who share positive or negative thoughts about those businesses or their products on digital channels. Electronic word of mouth marketing is defined as a positive or negative thought about a business or product expressed by potential, old, or real consumers on the Internet (Hennig-Thurau et al., 2004: 39). Such comments not only guide other consumers through the product and business, but also provide the business with information. E-WOM is one of the most

## ***The Role of Big Data in Digital Marketing***

important and effective sources of information. Research has revealed that 95% of consumers definitely read the comments of other consumers in digital environment thoroughly before buying a product, which increases the interaction between consumers and sellers by 720% (Aakash and Gupta Aggarwal, 2020: 2). Reading such comments elaborately and answering them if necessary are quite important for both marketers themselves and consumers. However, it can be very time-consuming and painful for businesses. In such situations, businesses can benefit from a variety of analysis methods that have gained popularity with the increasing use of Internet technology in the big data age (Aakash and Gupta Aggarwal, 2020: 2). Big data that is obtained from a wide range of sources can benefit businesses with the help of new techniques and tools that have been developed in the recent years.

## **EXAMPLES OF BUSINESSES USING BIG DATA IN DIGITAL ENVIRONMENT**

Big data guides business to make strategic decisions, organize their daily activities, and also guides them through budgeting and marketing decisions, and helps them discover new business opportunities and innovations (LaValle et al., 2011: 21). Therefore, businesses are benefiting from data collection, registration, storage, process, and proper data analysis more than ever.

For example, Wal-Mart's data analyses in 2004 showed that after a storm warning had been made, the sales of some products including Pop-Tarts increased by 700% just before the storm (Hayashi, 2014: 34). Such analyses can help retailers like Wal-Mart to realize the products that are popular during a specific period, identify those products and increase the supplies in that period, and develop various strategies to benefit from the expected rise in the best way possible.

According to the data analysis by NFLshop.com, women were unsatisfied with online shopping in summer 2012. This was because the vendor had the wrong idea that most women shopped online to buy presents for their loved ones (mostly men) rather than shopping for themselves. However, the analyses have revealed the fact that women usually shop for themselves on online stores. According to data, the store increased its sales by 25% in a year after designing its catalogues and intending their ads especially for women (Thau, 2013).

Southwest Airlines records the conversations between its personnel and consumers to get information about the business and employees. Analyzing those conversations which it believes would be helpful to gain consumer insight, Southwest Airlines is able to improve the information flow and restructure the business by training its personnel more often (Erevelles et al., 2016: 899).

In order to reach more detailed information about customers' future shopping and predict an online order before the customer actually does it, Amazon has obtained a patent right to access the order history, product search history, and shopping bag records of consumers shopping from businesses which use big data (Banker, 2014). This attempt of Amazon is for re-building the delivery strategies rather than improving marketing activities, which proves the potential power of big data analysis (Benoit et al., 2020: 237). What Amazon is doing here is to understand consumer insight by using big data and develop new marketing strategies. Making such radical decisions through big data, businesses aim to create more value and increase business performance (Kunc and Morecroft, 2010: 1165).

Like many other businesses, Kroger offers a shopping card to its customers and keeps shopping records of customers in order to monitor them. But unlike many other businesses, Kroger sends customized coupons to its customers considering their buying behavior instead of sending them the same coupons

for shopping. Analyzing the customer data and predicting what customers might buy in that month, the updated coupons are being sent to customers constantly and automatically (Germann et al., 2014: 589).

E-Bay and Target use customer browsing history and loyalty card data to speculate consumer demands and expectations and improve buying tendencies (Chen et al., 2012: 1169). While General Electric benefits from big data to increase the efficiency and productivity of its gas and power systems (Wamba et al., 2017: 357), Alibaba and Tencent have established a big data-based credit scoring system for their traditional banking systems to perform better (Cappa et al., 2021: 52).

Like many other brands, Nike Company designs its products based on customer demand, does stock control, prioritizes customer participation while carrying out marketing activities, pays attention to offer customized products to its customers, and manages to increase its sales as a result of customer data analysis (GalbRaith, 2014: 7). Collecting primary consumer data among almost four million drivers on the road through sensors and remote application management software, Ford has achieved the necessary product renewal and design (Erevelles et al., 2016: 901). Fresh Direct organizes its prices and sales development activities on a daily basis according to the data stream of consumers' daily online activities, visits to Internet pages, and customer service interactions. Likewise, Ford Motor, Pepsico, and Southwest Airlines analyze what customers share about themselves on social media sites including Facebook and Twitter in order to measure the instant effects of marketing activities and understand the changes in consumer sensitivity to their brands, and develop strategies accordingly (Bughin et al., 2010: 82).

To sum up, the amount of data created over the Internet has increased in the modern world where technology is advancing rapidly, and all kinds of electronic devices can be controlled by a computer. Thanks to those electronic devices, businesses are able to access a lot of information about consumer behavior and preferences (Perera et al., 2014: 83). As the amount and frequency of data increase, businesses are benefiting from big data more each passing day (Lynch 2008: 28). These examples reveal how businesses benefit from big data in the digital age.

## **SOLUTIONS AND RECOMMENDATIONS**

In this study, the importance of big data for the companies from the marketing perspective is presented.

The study reveals that the vast majority of consumers' purchases are made through digital channels. Nowadays, there are almost no industries of which big data analysis has not created a great effect. Big data guides businesses in making strategic decisions and organizing their daily activities that can also guide budgeting and marketing decisions and help businesses discover new business opportunities and innovations (LaValle et al., 2011: 21). The study reveals that, businesses, serving in a wide variety of industries, are increasingly focused on collecting, saving, storing, processing and analyzing big data day by day. As a result, the benefits that businesses gain from using big data in the digital age are enormous.

This study highlights that in the digital age, big data is an important element for businesses on the way to digitalization to achieve sustainable success. While surfing the Internet, consumers can leave several digital footprints (Blazquez and Domenech, 2018: 101). Businesses which monitor them meticulously are able to understand the consumer behavior, intents, demands, and expectations easily. As a result, businesses need to benefit from big data analytics in order to satisfy their customers and achieve sustainable success.

## **FUTURE RESEARCH DIRECTIONS**

This study is limited to a detailed literature study on the benefits of big data to businesses. Big data is a very important subject but the studies about it are very scarce. In future studies, purchasing behaviors of consumers can be analyzed according to their demographic characteristics by using quantitative methods. Authors can make interviews with the businesses from different sectors about how they benefit from big data and their marketing strategies in this regard.

## **CONCLUSION**

Big data comes in as a crucial element for businesses to maintain success on their way to digitalization. Both in the past and the present, the Internet has created many digital marks about consumers that businesses can collect and process (Ducange et al., 2018: 325). As a result of rapid technological advancements, consumers create a wide range and a large amount of data. The data created in such volume, velocity, and variety enable businesses to gain insight into consumer behavior. A proper analysis of those data helps businesses fill in the gaps about consumers and gain a competitive advantage in the market.

The importance of big data in digital marketing environment is revealed in this chapter. In line with this purpose, the definition, components, and sources of big data are reviewed in the first chapter of the study, while the second chapter is focused on the digital marketing concept. The role of big data in digital environments is discussed in the third chapter and the fourth chapter includes examples of businesses using big data in the digital environment.

In today's highly competitive environment, being in constant interaction and communication with their customers is of great importance to businesses in terms of establishing a long-term relationship with them. In this sense, big data can offer businesses extremely detailed information about customers. Thanks to the information they obtain, businesses are able to make better decisions, create different and innovative ideas, and increase business performance. In order to maintain a consumer-oriented approach, businesses need to use customer insight they gain from Big Data and constantly update the information at hand.

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## **KEY TERMS AND DEFINITIONS**

**Big Data:** Massive amounts of information which is difficult to store, manage, and analyze.

**Consumer Behaviour:** The examination of all activities related to the purchase of individuals or groups.

**Consumer-Centric Marketing:** It is a kind of marketing strategy that focuses on consumer needs and wants.

**Data-Driven Marketing:** Refers to strategies that are built on information derived from the analysis of big data collected through consumer interactions to create predictions about their future behavior.

**Digital Age:** The time-period of every kind of technologies are providing users the skill to certainly and quickly get information.


**Digital Marketing:** A marketing strategy that enables to reach consumers with the help of digital channels.

**Marketing Strategy:** It is a long-term, forward-looking approach of a business that aims to gain a sustainable competitive advantage by understanding the needs and wishes of its customers.

# Chapter 3

## Digital Marketing vs. Traditional Marketing: Literature Review and Practical Lessons

Vera Gelashvili

 <https://orcid.org/0000-0001-5951-6392>

King Juan Carlos University, Spain

### ABSTRACT

*Digitalisation has caused important changes that have affected people's lives on a social, economic, or personal level. These changes have affected both business and society in general. Therefore, companies had to adopt different strategies to reach with their users, since traditional methods were no longer effective in some cases. It is the case of marketing, where companies had to change or blend traditional marketing with digital marketing (i.e., to promote their products and services through the internet). The aim of this work is to analyse the existing literature on similarities and differences between traditional and digital marketing. The methodologies used to achieve these objectives were a systematic literature review and bibliometric analysis by Scopus. The results obtained have shown that both traditional and digital marketing are important for companies, so firms must find out which of them is more compatible with the company's objectives. This chapter provides practical lessons for entrepreneurs or marketing makers when choosing a type of marketing for their businesses.*

### INTRODUCTION

Since the Internet was born, has taken place to important changes that have affected people's lives on a social, economic or personal level (Haythornthwaite, 2005; Matthyssens et al., 2008). Not only people have been conditioned by this change, but the business world, which has had to adapt to the new methods of conducting business (Saura et al., 2019). Therefore companies had to change their way of reaching customers, doing business or using different technological tools that have allowed greater effectiveness and profitability (Martínez-Navalón et al., 2020; Ribeiro-Navarrete et al., 2021). One of the areas of the company that has been specifically affected by these changes has been marketing (Lagrosen, 2005). In

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particular, companies had to implement digital marketing, i.e. to promote their products and services through the internet. That is why traditional marketing has been affected in most cases, because companies had to invest more in digital marketing, leaving aside traditional marketing.

According to Morozan et al. (2009) through digital marketing it is possible to promote products and services using digital distribution channels to reach consumers in a relevant, personal and cost-effective way. Digital marketing strategies can measure multiple factors, such as sales or conversions, to time spent viewing a website or preferences. Therefore digital marketing allows for much more flexibility and full customer treatment. Also, it enables a personalisation of the strategy that is more tailored to the target audience. In addition to this, digital marketing allows to have a clear information about products and services, has a greater engagement of customers or enables instant purchase (Yasmin et al., 2015). Therefore, companies should try to find out through digital channels what their customers want and demand, as this is directly related to customer satisfaction and trust towards the product and services (Gelashvili et al., 2021).

In the meantime, traditional marketing is based on promotional strategies such as direct sales, television, radio, mail and print media (Cant and Wiid, 2016). In most cases, traditional marketing reaches a local audience more easily than other types of marketing and longevity is the main reason why people are used to traditional marketing (Todor, 2016). According to study elaborated by Kashani et al. (2005) traditional marketing focuses on the immediate “consumers” of the company’s products and services who are defined as the “next in line”. Companies using the traditional marketing system must plan, implement and control the strategies to achieve the proposed objectives, in addition to this they must set marketing goals for the company (Armstrong et al., 2009). Traditional marketing methods to reach the customers are different among them it is possible to distinguish newspapers, radio, TV, billboards along roads and highways, etc. (Sinha, 2018).

According to Pascalau and Urziceanu (2021) traditional marketing requires a lot of time, money and manpower. In addition to this, traditional marketing is often not available, as it depends on the availability of media such as TV, radio or newspapers. While, digital marketing is not time-bound, can be updated quickly and consumers in different countries can have access to products that are not available in their home country. Despite this, both types of marketing are useful depending on several factors that marketers must take into account. The authors of the study conclude that traditional marketing tends to be more effective if it operates at a local level, whereas digital marketing is more effective at a global level as it reduces communication barriers and users can access certain products and services from anywhere on the planet. Other marketing studies (Kaur, 2017; López García et al., 2019; Roncevic et al., 2019; Todor, 2016) have concluded that for a company or product one type of marketing may be more efficient than the other, or in some cases the best result may be obtained from a mix of digital and traditional marketing (Srinivasan et al., 2016; Todor, 2016). Consumers of traditional marketing products and services have the advantage such as possibility of see and touch the real goods or service (Salehi et al., 2012) which in the case of digital marketing is not possible. In addition to this, in digital marketing the data is used properly which makes it different from traditional marketing (Durmaz and Efendioglu, 2016).

In general, several studies have analysed traditional marketing and digital marketing separately, although the literature review has shown that there is a lack of studies that go into the comparison of these two different types of marketing (Durmaz and Efendioglu, 2016; Kumar et al., 2017; Pantano et al., 2019), analysing the similarities or main differences that exist ((Durmaz and Efendioglu, 2016; Yasmin et al., 2015). This leads to a lack of academic literature on the subject. However, it is worth noting that more studies have been published in recent years on digital marketing alone (Nasiopoulos et al., 2019).



Although the number of studies on digital marketing has increased, it should be noted that most of these studies are generic, despite the advances or increases in research on digital marketing there is a lack of specific studies, such as on the improvement of management of Data Sciences in digital marketing (Saura, 2020).

It is therefore worth asking what are the main differences and similarities between these two methods of marketing? Can a company opt for both types of marketing or does it have to choose one of them?

Taking all of this into account the aim of this book chapter is to analyse the existing literature on similarities and differences between traditional and digital marketing, check why in some cases traditional marketing is effective and vice versa. In addition to this, this research will analyse the number of studies that have been published separately on digital marketing and traditional marketing taking into account the type of document, the country of publication, the area of publication or the evolution of the number of studies over the years.

In order to achieve the objectives set out, first of all, a review of the literature on the concepts of digital marketing and traditional marketing will be carried out. The systematic literature review methodology is a widely used methodology in the legal and social sciences in the recent years (Lim et al., 2019; Ribeiro-Navarrete et al., 2021; Safarov et al., 2017; Saura et al., 2021b). It is a methodology that studies different researches on a specific topic that allows objective conclusions to be drawn based on the literature analysed. In addition to this, bibliometric analysis by Scopus has been done. Scopus is a bibliographic database that provides bibliometric analysis tools based on various criteria such as the number of citations received by the articles, area of publication, publication entities, country of publication, evolution of the number of articles per year, etc. The Scopus database is increasingly used for bibliometric analysis in recent years (Liu, 2020; Parlina et al., 2020; Schotten et al., 2017) as it allows for fairly objective results and conclusions to be drawn on the basis of high-impact studies.

The systematic literature review of the literature has shown that there are several similarities and differences between traditional marketing and digital marketing. Among the similarities it can highlight that both are the way a company communicates with its customers with the objectives to get more users, increase the volume of sales and increase the advantage over its competitors. Apart from that, both types of marketing try to have a direct contact with the customers, to send a message through marketing and to give detailed information about products and services and thus to increase the possibility of the sale at the moment or in the future. The main differences of this two types of marketing are several, among them it can distinguish the mode of communication by which companies act with their customers. In case of traditional marketing there is no direct contact with the consumers, while in digital marketing the communication is based on direct interaction between the company and the customers. Among other differentiating factors between digital and traditional marketing are the marketing cost, marketing content, the marketing target audience and the measurability of the marketing result.

Taking into account the type of companies, the type of activity or the products offered, it has been determined that both types of marketing are efficient. Traditional marketing is specifically useful for small and medium enterprises (SMEs), while big companies reach their customers faster with digital marketing. However, most companies perfectly combine both types of marketing to achieve the desired objective. Based on this it can be concluded that companies need to carefully study their customers, the environment, the market they operate in, the competitors and then apply one of the marketing types or combine the two to achieve the best result.

The results obtained for this book chapter have a great of importance in the academic literature, as several studies have pointed out that there is a lack of studies on these two important types of marketing

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used by most companies all over the world. Furthermore, the paper presents managerial implications that can be of great help in establishing the right type of marketing for companies products and services. Along with the managerial implications, practical implications are presented that are of great interest to society on the whole.

This book chapter is structured as follows. The 1<sup>st</sup> chapter is the introduction, where the motivation, justification, objectives, methodology and main conclusions and implications of the study have been briefly described. The 2<sup>nd</sup> chapter is on traditional marketing, where the literature review together with the Scopus bibliometric analysis has been elaborated. Chapter 3 analyses the existing and most updated literature on digital marketing, as well as a bibliometric analysis of the subject is carried out. Chapter 4 compares digital marketing and traditional marketing, where the main similarities and differences are presented. Chapter 5, which is the final part of this book chapter, presents discussions, conclusions and managerial and practical implications. Moreover, the limitations and future research lines are presented at the end of chapter 5.

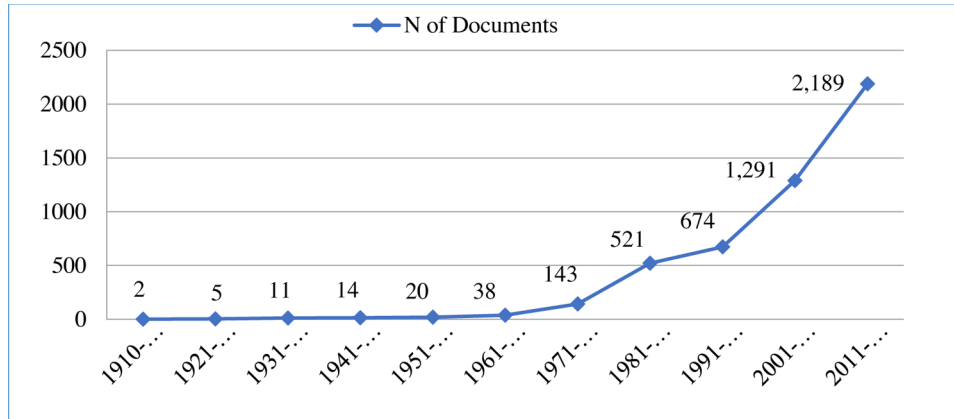
## **TRADITIONAL MARKETING**

The first attempts to define marketing discipline started at the beginning of the 20<sup>th</sup> century. According to Carasila (2006) the three clearly differentiated periods have been identified for the marketing definition: the pre-conceptual period (1900-1959), the period of formal conceptualisation (1960-1989) and the current period of the marketing concept (199 -2005). The pre-conceptual period is a question of discovery, conceptualisation, integration, development, reapplication and reconception of the marketing concept (Bartels, 1988). In the pre-conceptual period Clark (1922) publishes the book on marketing principles, where for the first time marketing was defined as a discipline. The second period of formal conceptualisation can be described as the period of major marketing advances, including the formal definition provided by the American Marketing Association (AMA). In this second period many researchers (Borden, 1964; Kotler, 1972; Kotler and Keller., 1982; McCarthy et al., 1979) in the area have made significant contributions to the marketing research. In the last period of marketing development, the concept has been clarified and divided by different types of marketing such as: traditional marketing, social marketing, rational marketing, digital marketing or social media marketing among others.

Taking into account the evolution of the concept of marketing over the last century, the numerous studies and definitions, it is difficult to come up with a single definition. Therefore, the latest AMA (2017) update on the marketing concept can be considered as a general concept, where the marketing is defined as “the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large”<sup>1</sup>. Therefore, we can say that marketing is a science that allows companies to interact with their customers, where a set of techniques and strategies are used to study the behaviour of markets, the commercial management of companies and the needs of consumers. Another definition provided by Kumar et al. (2017) considers traditional marketing as “an offline form of advertising used to promote sales”.

Through the Scopus bibliometrics it has become clear that in the last decades the number of studies on marketing has increased. The following graph shows on average, the number of research papers, books or working papers that have incorporated the word “marketing” in their title by year.

Figure 1. Average number of documents that include the word “marketing” in title  
 Source: Own elaboration based on data provided from Scopus



As we can see in the graph 1, marketing studies have increased considerably in the last decade. Although, the table shows the average number of documents that have used the word marketing in their title, in total there are 49,534 documents. 67% of these documents are scientific research papers, 9.6% are conference papers, 7% are book chapters and the rest of the percentage belongs to notes, reviews or working papers among others. If we analyse these documents by subject area we see that more than 30% are published in the area of management, administration and accounting, almost 12% are classified in the social science area and others in different subject areas.

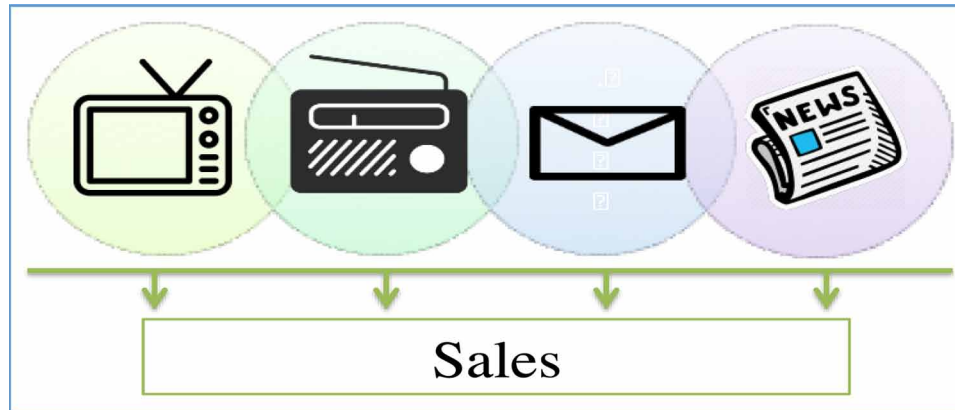
Over time the concept of marketing has evolved. With the advance of technology different marketing channels have appeared and among them is “traditional marketing” which is the marketing based on the advertisements in newspapers and journals, radio, TV, brochures, newsletters, promotions, etc. (Opreana and Vinerean, 2015; Salehi et al., 2012). Based on that, it can be said that traditional marketing uses these tools to sell products and services. According to Schmitt (1999) Traditional Marketing refers to “a canon of principles, concepts and methodologies gathered by scientists, consults and marketing practices and it describes the nature of products, the behaviour of consumers, and competitive activity in the marketplace”.

A review of the literature on traditional marketing shows that there are very few definitions of the concept of “traditional marketing”. This may be due to the fact that traditional marketing is marketing from the beginning, so its definition is directly related to normal “marketing” concept. In addition to this, many authors refer to “traditional marketing” as “offline marketing” (Salehi et al., 2012; Srinivasan et al., 2016), which can be one of the disadvantages when analysing the concept. There are more disadvantages of traditional marketing such as the difficulty to measure results, high costs especially for some specific cases and if changes occur it is not easy to change the way of marketing (Todor, 2016). Among the advantages of traditional marketing one can distinguish the possibility to physically see the product and then make the decision to purchase it or not (Salehi et al., 2012) or faster results and level of confidence generated in consumers (Todor, 2016).

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Figure 2. Traditional marketing

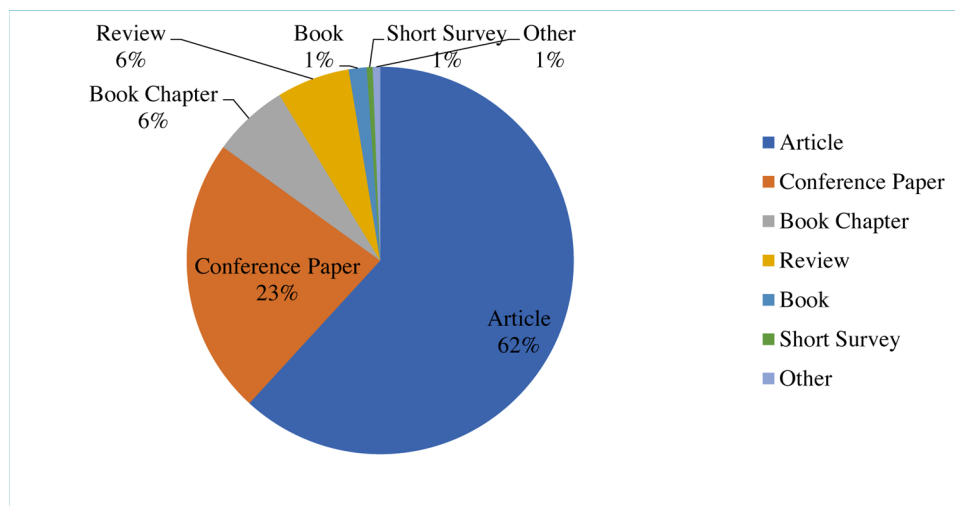
Source: Own elaboration



The Scopus bibliometric review has shown that the term “traditional marketing” has been used in the title of 32 research paper and 804 documents have included this term in their title, abstract or in key words.

Figure 3. Number of documents by type that include the concept “traditional marketing” in title, abstract or keywords

Source: Own elaboration based on data provided from Scopus



As shown in the graph, 62% of the papers that have analysed traditional marketing are scientific articles. 23% are conference papers and 6% book chapters and review. Analysing by year, we have seen that 74 papers have been published in 2019 (the highest number), while in 2020, 70 papers were published on this topic. The most published country on “traditional marketing” is the United States (198), followed by China (111), United Kingdom (81) and India (43).

## DIGITAL MARKETING

Since the digitalisation of the market, things have changed for both companies and consumers, and generally for society (Sehlin et al., 2019). For the companies, digitalisation offers too many opportunities for growth in all areas, promotes longer life for products, minimises the transaction costs and waste, gain a competitive advantage or contribute positively to economic growth (Antikainen et al., 2018; Myovella et al., 2020; Szalavetz, 2019). But not all are advantages, according to Ahmad and Murray (2019) digitisation is directly related to a certain cost for the company.

The digitisation of companies has contributed to the improvement of marketing strategies and has made it possible to have a type of digitisation-oriented marketing called “digital marketing”. In general, digital marketing (marketing 2.0) is the set of strategies aimed at promoting a goods and services on the internet. It differs from traditional marketing in that it includes the use of channels and methods that allow the analysis of results any time and facilitate the relationships between customers and companies (Wymbs, 2011).

The concept of digital marketing has been defined by several authors. In the next table the systematic literature review on the definition of digital marketing is shown (there are shown the most quoted definitions).

*Table 1. Digital marketing definition: systematic literature review*

Author	Year	Definition
AMA <sup>2</sup>	2019	“Digital marketing is the use of digital or social channels to promote a brand or reach consumers. This kind of marketing can be executed on the internet, social media, search engines, mobile devices and other channels”.
Chaffey and Ellis-Chadwick	2019	Digital marketing refers to “achieving marketing objectives through applying digital technologies and media”.
Kannan and Li	2017	Digital marketing refers to “an adaptive, technology-enabled process by which firms collaborate with customers and partners to jointly create, communicate, deliver, and sustain value for all stakeholders”.
Chaffey, Ellis-Chadwick, Mayer and Johnston	2009	“Digital marketing involves applying digital technologies which form online channels to market to achieve following objectives: support marketing activities aimed at achieving profitable acquisition and retention of customers within a multichannel buying process and customer lifestyle”.

Source: Own elaboration

According to study elaborated by Yasmin et al. (2015), there are several techniques by which digital marketing is composed, like as: online advertising - internet adds that best suits the interests of consumers; email marketing - when the content of an advertisement or offer is sent via email; social media - when advertisements about a product or service can be seen on social media pages; text messaging - when information on products and services is sent via mobile phone message; affiliate marketing - is a type of performance-based marketing where a company rewards affiliates for each customer they bring in through the marketing efforts they create on behalf of the company; Search Engine Optimization - affecting the visibility of a web page in a search engine’s natural or un-paid search results; and Pay Per Click – that use search engine advertising to generate clicks to websites instead of get those clicks organically. Nowadays, the daily activity of companies operating on the internet includes such techniques to improve

## Digital Marketing vs. Traditional Marketing

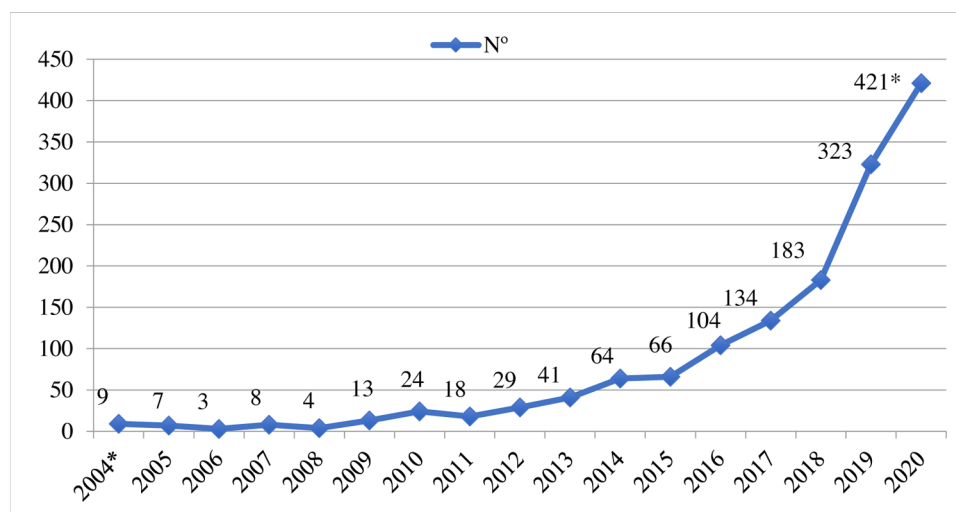
the digital marketing strategy (Saura, 2020). It is worth noting the importance of social networks as the information provided by them directly affects consumer behaviour (Saura et al., 2021a). Based on this we can say that digital marketing is a quite complex type of marketing for marketers as there are different ways and techniques to reach customers with a suitable product or service.

The main advantages of digital marketing for the companies are direct relationship with customers, possibility to measure the effect of advertising more easily (Mogos, 2015), duration of the information on the internet as it is permanently available in some cases, (Todor, 2016), low investment cost comparing with traditional marketing (Tiago and Veríssimo, 2014), easy to get data on the specific customer touchpoints with the company (Kannan and Li, 2017), or capability to record consumer behavior including their preferences and responses to various products (Atshaya and Rungta, 2016), among others. Based on Veleva and Tsvetanova (2020), main disadvantages for the company when use digital marketing are: availability of information for everybody that is an advantage for competitors, the reputation of companies can be destroyed by negative feedback provided by users, not to be suitable for all types of products and services, inappropriate use of digital tools and applications, etc. In addition to this, security and privacy issues in social networks can be a problem, so companies must take it into account (Saura et al, 2021c). Taking all this into account, we can say that digital marketing has its advantages and disadvantages, therefore companies should take into account when implementing it.

The Scopus bibliometric review about digital marketing has shown that the term “digital marketing” has been used in the title of 434 research paper and 1,451 documents have included this term in their title, abstract or in key words. From this 1,451 documents 59% of these are scientific articles, meanwhile, conference papers are 25%, and reviews and book chapters are 5% of the documents elaborated on digital marketing.

Figure 4. Number of documents by type that include the concept “digital marketing” in title, abstract or keywords

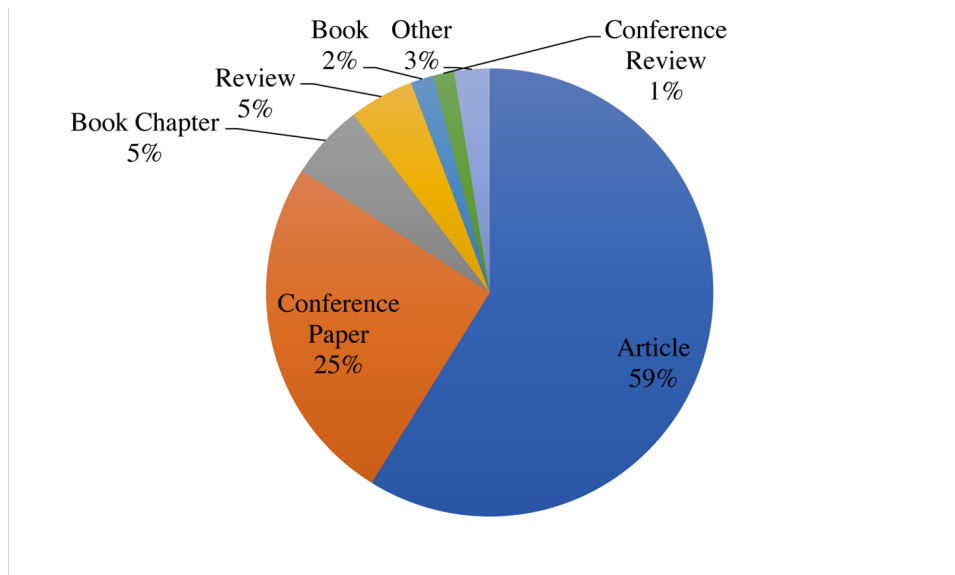
Source: Own elaboration based on data provided from Scopus



The result of the bibliometric literature review has shown that the country where the document about digital marketing is most published is United States with 267 documents. After the United States, the countries with the highest number of publications on digital marketing have been India (207), United Kingdom (151) and Spain (71).

The first documents elaborated on digital marketing date back to the 21<sup>st</sup> century. Since then, the number of documents published on this subject has increased year after year. As it is shown in the graph 4, since 2015, the number of documents produced has exceeded one hundred. In 2018, 183 documents were prepared and published, while in 2019, 323 documents on digital marketing were created and in 2020, the number of documents has doubled compared to 2018.

*Figure 5. Number of documents that include the word “digital marketing” in title, abstract or keywords  
Source: Own elaboration based on data provided from Scopus  
2004\*- documents from 2004 and previous years; 2020\* - includes 46 documents of 2021 January/February*



Having this result it can be predicted that this number will increase in the next few years as digital marketing is of great interest for both companies and customers. In relation to the documents published by subject area the result has shown that 25.5% of documents were published in the area of management, administration and accounting, almost 20% are classified in the area of computer sciences, 18.8% in social sciences and 11.2% in the area of engineering.

## **DIGITAL MARKETING VS. TRADITIONAL MARKETING**

Technological advances in the world have changed the rules of communication for everyone, including businesses and consumers (Durmaz and Efendioglu, 2016). Companies have invested to reach their customers more easily, efficiently and without high costs. With these changes companies had to adapt their marketing strategy to digital marketing or make a marketing mix using both traditional as well as

## **Digital Marketing vs. Traditional Marketing**

digital marketing (Siakalli et al., 2017; Todor, 2016). Digital marketing techniques can be used alongside traditional marketing techniques and this is one of the main advantages when looking at digital marketing (Chaffey and Ellis-Chadwick, 2019).

According to Kayumovich and Annamuradovna (2020), in the case of traditional marketing, companies provide consumers with information that they believe is useful to them, whereas in the case of digital marketing, it is consumers who seek information about products and services and companies must provide more detailed and extensive information if they want to be competitive in the market.

Taking into account the review of the literature on traditional and digital marketing in the previous sections, the following differences and similarities of these two types of marketing can be distinguished:

### **Main Differences between Traditional and Digital Marketing**

**Means of Communication** - the main difference between digital and traditional marketing are the channels through which companies act with their customers. Traditional marketing uses the more traditional media such as television, radio and newspaper advertisements among others. Digital marketing uses digital channels that are accessed through the internet, such as advertisements on websites, in social media or through email.

**Communication** - in digital marketing, users can interact with the company, whereas in traditional marketing the user is totally passive.

**Target Audience** - part of consumers that companies target in their marketing efforts to drive awareness of their products or services. Today, for traditional marketing its target audience is a group of consumers previously identified by specific products and services, and, also people who do not have access to or do not use digital media. For digital marketing its target audience are consumers who use digital media to make enquiries about product or service features or make purchases online.

**Content** - in case of digital marketing it is possible to give more specific information about some products and services, while in traditional marketing the content of information is limited.

**Measurement of Results** - in this respect we are not talking about measuring the profitability result, as this can be measured through both types of marketing. Measurement the results in this case refers to measuring how efficient the marketing of a brand, product or service has been, whether it has reached the customers and how well it has been accepted by them. The use of instant messages and comments about products and services on the internet makes it possible to measure the effectiveness of digital marketing, whereas in the case of traditional marketing it is difficult and in some cases almost impossible to achieve such instant results.

**Cost** - digital marketing is cheaper than traditional marketing, making it accessible to any business. However, it must be taken into account that the implementation of digital marketing (digitisation of the company) involves a high cost for the business (Ahmad and Murray, 2019).

### **Main Similarities between Traditional and Digital Marketing**

**Reach an audience** – in case of both types of marketing the main objective is to reach as many consumers as possible, and thus be able to make higher sales volumes and compete with competitors in the market.

**Send a Message** – both digital marketing and traditional marketing aim to send a clear message to their consumers. Through these messages consumers can have a first information about offered products and services and evaluate their purchase at the moment or in the future.



Taking all that into account we can say that there are several differences between these two types of marketing (Kayumovich and Annamuradovna, 2020; Siakalli et al., 2017), but both have as their main objective to reach their consumers in an easy and fast way and provide clear, reliable and useful information to its users (Todor, 2016).

## **DISCUSSION, CONCLUSION AND IMPLICATIONS**

The aim of this book chapter was to make an analysis of the existing literature on the differences and similarities between digital marketing and traditional marketing. In addition to this, a systematic review of the literature on these two types of marketing is to be carried out. In general it can say that marketing studies have increased considerably in recent years. Every year there are more and more marketing researches and more than 50% of them are published as research articles. When comparing digital marketing with traditional marketing it is shown that in 2020 almost 300 more papers have been published on digital marketing than traditional marketing. This implies the great interest of researchers in digital marketing. This may also be due to the fact that digital marketing has the potential to reach consumers in all corners of the world (Pascalau and Urziceanu, 2021). Additionally, the COVID-19 pandemic has forced many companies to digitalizad (Faraj et al., 2021), this has been very noticeable in their type of marketing (Almeida et al., 2020) as for several months almost everywhere in the world people could not leave their homes freely and most of the companies were either closed or selling online (Kim, 2020). Therefore companies did not have the possibility to promote their products and services through traditional marketing. This increase of studies on digital marketing could also be based on the demands of companies, as most of the literature (Ahmad and Murray, 2019; Mogos, 2015; Pascalau and Urziceanu, 2021) has pointed out numerous advantages that digital marketing has over traditional marketing, among these advantages can be distinguished the possibility to save costs (not in the first stage), to get consumers from different countries or to manage historical data of consumers to achieve their stated goals.

Even so, it should be noted that both marketing methods are modes of communication between a company and its consumers. Therefore, it is up to the company to decide which type of marketing is best for its business strategies. For SMEs, which make up the majority of the business fabric, it has been indicated that traditional marketing is most effective, especially at the local level (Pascalau and Urziceanu, 2021; Todor, 2016), and it should be borne in mind that very few SMEs manage to grow and internationalize (Gelashvili et al., 2019).

Literature review has shown that marketing strategies can be carried out through traditional or digital channels (Chaffey and Ellis-Chadwick, 2019; Siakalli et al., 2017). Before the digitisation of companies traditional marketing practices were successful and led many companies to grow and become big brands. Therefore, with the change they had to adapt and change their strategies partially or completely. Although we can say that with the advance of digital marketing, traditional marketing has not disappeared, it is still a marketing strategy commonly used by both multinational and SMEs. International corporations (e.g. McDonald's, Burger King, etc.) still use traditional marketing together with digital marketing and aim to reach their customers efficiently. In case of SMEs, traditional marketing is essential, as it is the easiest way to make their products and services known locally.

Digital marketing can bring the company several advantages, firstly it is cheaper than traditional marketing, secondly it can easily measure the results of the marketing strategy used and finally it is sustainable over time. In addition to this, digital marketing is directly related to environmental sustain-

## ***Digital Marketing vs. Traditional Marketing***

ability (Martínez-Navalón et al., 2019; Martínez-Navalón et al., 2020). Another advantage of using digital marketing is the possibility of interacting with consumers in the moment, record consumer behavior including their preferences and save consumer behavior data for future interactions.

Taking all of this into account, it is possible to propose some managerial implications / practical lessons for companies or for entrepreneurs who have doubts about what kind of marketing strategies to use. Therefore, the following ideas are suggestions that are proposed in order to run any marketing strategy successfully in the company.

1. Companies must first study the environment in which they want to move their products and services. Depending on this, a traditional marketing or digital marketing strategy could be used. A strategy mix based on market demand can also be suitable.
2. The implementation of digital marketing does not guarantee low marketing costs. First of all the digitalisation of the company and then the creation of the first internet marketing strategies (e.g. website creation) is carried out with a considerable initial investment.
3. With the implementation of digital marketing, companies should not forget about traditional marketing as this last one provides several advantages and for some companies it could even be the only marketing strategy option.
4. Company managers should consider the advantages of both marketing modes as well as their disadvantages in order to achieve better results.

Apart from these managerial implications, it is worth noting that there is a lack of academic literature on the comparison of traditional marketing and digital marketing. Therefore, the academy should focus on this very important issue, especially in this time of post COVID-19, which has made many companies unable to continue to operate or has worsened their performance. Therefore the correct application of the right type of marketing can save many of them and should be academic studies that promote and propose practical and managerial implications in such an important area as marketing. Therefore, this study fills the gap in the academic literature on the comparison of digital marketing and traditional marketing. At the same time it is of interest for companies or managers of them to analyse marketing strategies well and implement them in the right way to ensure the best results.

This study is not free of limitations. Bibliometric analysis of marketing strategies, specifically digital and traditional marketing is done through Scopus tool, which is a disadvantage to use only one bibliometric tool, because in case of using another bibliographic tool it could be possible to make a comparison of the results obtained. Another limitation of the study was language. In bibliometric studies, keywords are normally used in only one language, as was the case in this book chapter. But there are some very interesting and powerful studies in other languages such as Spanish, German, French or others. For future research lines, it is interesting to make a bibliometric analysis using other bibliographic tools such as Web of Science and Google scholar metrics and compare the results obtained with Scopus bibliometric analyses. Apart from this, it will be interesting to use the SciMAT software that allows a mapping analysis that allows a better visualisation of the results on the basis of maps.

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## KEY TERMS AND DEFINITIONS

**Marketing:** The activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large (AMA, 2017).

**Traditional Marketing:** Is an offline form of advertising used to promote sales (Kumar et al., 2017).

**Digital Marketing:** Is the use of digital or social channels to promote a brand or reach consumers. This kind of marketing can be executed on the internet, social media, search engines, mobile devices and other channels (AMA, 2019).

**Marketing strategy:** Marketing strategy refers to an organization's integrated pattern of decisions that specify its crucial choices concerning products, markets, marketing activities and marketing resources in the creation, communication and/or delivery of products that offer value to customers in exchanges with the organization and thereby enables the organization to achieve specific objectives (Varadarajan, 2010).

**Digitalisation:** Is a strategic tool used by company for continuous development based on the implementation of technology (Sehlin et al., 2019).

## ENDNOTES

<sup>1</sup> <https://www.ama.org/the-definition-of-marketing-what-is-marketing/>

<sup>2</sup> <https://www.ama.org/topics/digital-marketing/>

# Chapter 4

## Digital Loyalty Programmes: Pull Strategies in B2B Channel Marketing

**Ammarah Marjan**

*London South Bank University, UK*

**Charles Graham**

 <https://orcid.org/0000-0001-7603-9161>

*London South Bank University, UK*

**Margaret Bruce**

*London South Bank University, UK*

**Andrew Mitchell**

*Brandmovers Inc., USA*

### ABSTRACT

*Digital loyalty programmes are an increasingly common tool for business-to-business marketers hoping to increase repeat sales through deeper customer engagement. In consumer markets, such programmes do little to influence behavioural loyalty and disproportionately attract the firm's existing heavy buyers. Industrial buying, however, relies on direct sales channels and features negotiation and reciprocity. Loyalty effects may therefore differ in B2B, and although no clear picture yet exists, such knowledge is important as B2C digital loyalty programmes grow in popularity. Here, the authors describe programme membership's evolving characteristics over in a B2B scheme that was launched in the US metal-cutting tools manufacturer customer base. Findings are consistent with the idea that the scheme recruited the heaviest buyers earliest and had an insignificant effect on total revenue. The authors discuss managerial implications, particularly about (1) managing the rollout of similar schemes and (2) refocussing on the programme objectives to maintain sales from the lightest rather than the heaviest buyers.*

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## INTRODUCTION

The chapter considers the effectiveness of end-user digital loyalty programmes in the business to business (B2B) domain. Pull strategies of this type that create demand among end-users are common in consumer markets but unusual in B2B marketing, where push tactics are more normally prioritised to promote products through distributor channels. Advances in data science now make B2B loyalty programmes both affordable and practical, but their benefits may not yet be fully understood in a B2B setting. This chapter aims to set out those benefits by discussing the launch and diffusion of a novel end-user loyalty programme that connected a heavy industrial manufacturer with its end users through the existing distributor network.

The term “loyalty programme” captures a range of marketing initiatives, including discount vouchers, reward cards, tiered service, membership levels, dedicated customer support, and other techniques (Henderson et al., 2011), all designed to encourage repeat buying (Uncles et al., 2003). Loyalty programmes share a common purpose: to attract new consumers to the brand and to lock in existing members (Juetten et al., 2006; Ziliani & Ieva, 2019), and there is some evidence that they may successfully drive market share growth (Humby et al., 2004).

Previous authors challenge the idea that in consumer packaged goods or retail, schemes targeting consumer loyalty can create differential advantage. This is because it is normal for rival brands to share customers, and those rival brands often also have rival schemes (Verhoef & Langerak, 2003; Liu & Yang, 2009). In addition, the capacity of the heaviest users to increase purchasing is limited (Bolton et al., 2000; Lal & Bell 2003); the schemes appeal mainly to existing, loyal customers (Meyer-Waarden & Benavent, 2006); and loyalty strategies are in any case defensive, doing little to replace lost users (Sharp & Sharp, 1997). In other words, “*loyalty programmes are a poor marketing tool*” (Shugan, 2005; Magatef & Tomalieh, 2015) which reflect rather than change existing behaviours.

However, important differences exist between buying behaviours in B2B and B2C (business to consumer) contexts. Industrial manufacturers and their distributors have a relatively smaller customer base with bigger and more regular purchasing, some fixed contractual binding, professional buyers and sellers, a close relationship between parties (Jackson & Cooper, 1988; Wilkinson et al., 2016), and an emphasis on customer retention strategies (Dorotic et al., 2012). These differences may affect the operation of a loyalty programme, or render it ineffective. They might also breach the as-if random interpretation of buying behaviour that underpins the generalised stochastic models used to assess and predict repeat buying.

The adoption of end-user digital loyalty programmes in industrial markets would seem to meet many of the objectives of the B2B marketer, encouraging higher loyalty, reduced shipping costs, and increased repertoire size (Capizzi, 2002; Lacey & Morgan, 2009; Kwiatek & Thanasi-Boce, 2019). Here we ask, are loyalty programmes, a pull strategy, an appropriate and effective tool for channel marketers where push strategies are more generally the norm?

In this chapter, we explore three questions. The first - are pull strategies a suitable tool for B2B marketing at all? B2B marketing investment is usually designed to maintain distribution relationships and competitive advantage within the distribution channels. B2B brands are not usually advertised to B2B customers to the same degree as B2C brands because the one-to-many model is not justified by the limited size of the B2B target market and its bulk buying. Instead, relationship marketing is the usual technique designed to reward and develop the behavioural loyalty of *distributors* and particularly the most valuable ones (Reichheld & Sasser, 1990). But just as in consumer markets, while the end-user buys the brand, they are not directly the brand’s customer.

## Digital Loyalty Programmes

Second, are loyalty programmes useful mechanic in industrial marketing? In B2C and services marketing, some question whether loyalty programmes grow sales. Previous research has extensively applied stochastic models of aggregate repeat-buying such as the NBD or NBD Dirichlet (Dowling & Uncles, 1997; Sharp & Sharp, 1997) to establish that while there may be other benefits, programme membership has little impact on expected purchase frequency or scheme adoption across the customer base (Uncles et al., 2003). Applications of the models and the empirical generalisations they describe have successfully extended to some B2B buying contexts (McCabe et al., 2013; Pickford & Goodhardt, 2000; Schmittlein & Peterson, 1994), but this work has not yet extended to the study of B2B loyalty programmes and in particular, it pre-dates the rapid advance of advanced digital marketing techniques.

Our third question, then, is whether digital advances have changed anything. The greater marketing efficiency noted by Saura et al (2017) has been achieved by the shift to online platforms (Russell, 2010), and this creates two meaningful opportunities. Firms now have access to a vast array of digital tools to communicate with customers, and second, such tools have made marketing activities more measurable by improving marketers' ability to access, gather, analyse, and report data (Pauwels et al., 2009) and take action. But the complex nature of channel relationships means that end-user performance data is often hard to come by, and ownership of detailed market insight is both limited and one-sided. A manufacturer/end-user loyalty programme that operates through the distributor network could address this challenge to the benefit of all players. Therefore, while an online B2B loyalty programme might not drive improvements in sales directly, as a result of the data-driven insights generated, it may improve a manufacturer's ability to manage sales performance through the whole channel. Advantageous distributor relationships might then be developed based on allocations of end-user performance rewards generated and managed digitally and at a low cost.

Following a recent call for further research into the effectiveness of loyalty programmes (Chen et al. 2021), this chapter raised three critical questions. Can a B2B pull strategy based on a loyalty programme (1) solve the problem of customer and end-user management in complex distribution channels (2) build sales through end-user loyalty, and (3) provide strategic customer relationship management (CRM) insights that deliver a competitive advantage to the manufacturer while benefitting the distributor network.

To explore these questions, we offer a case study that describes the introduction and rollout of a novel digital B2B *channel* loyalty programme in a heavy industrial setting and the unforeseen benefits achieved for all channel members involved. We examined this, first evaluating changes in aggregate behavioural loyalty in membership sales data as the new scheme rolled out and from contemporaneous interviews with management at the global digital marketing agency that innovated the scheme.

In the following sections, we provide an overview of the literature framing the study then a summary of the methodology and data sources employed. The results and their implications are then discussed, with a summary of limitations and suggested further research.

## THEORETICAL OVERVIEW

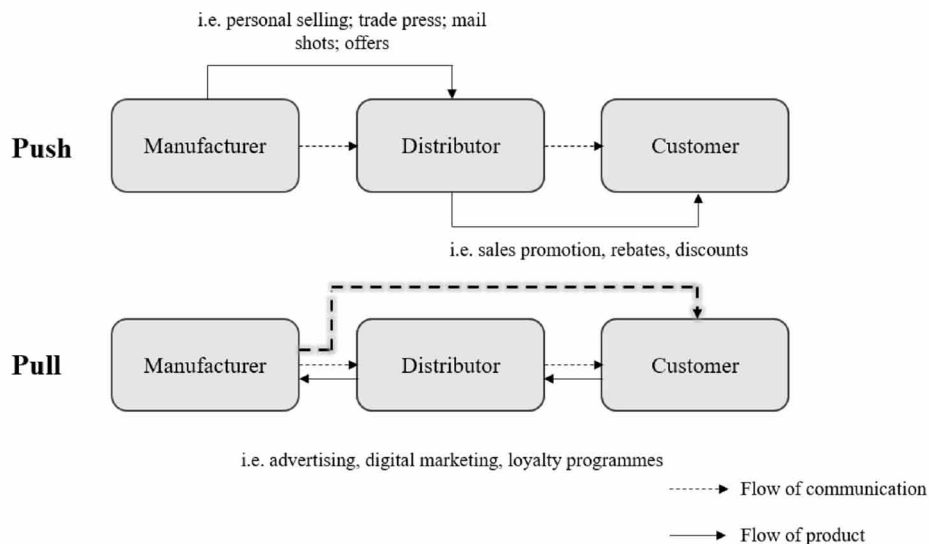
### Channel Marketing

Most industrial manufacturers do not directly sell their goods or services to their end consumers. Instead, they turn to market intermediaries (wholesalers, distributors, retailers) to facilitate the flow of manufacturing output to the market (Brocato, 2010), also known as *channel marketing*. In turn, mar-

keting intermediaries work as a mediating link between manufacturers and end-consumers (Kotler & Armstrong, 2010) and can add significant marketing value. For example, intermediaries represent the manufacturer and its brands in the marketplace and may provide logistic support by offering pre-and post-sales services (Fayyaz & Azizinia, 2016).

In turn, intermediaries work with multiple, competing partners (Calantone & Gassenheimer, 1991; Aman, 2017); therefore, a common strategy for rival manufacturers is to push their products through the channel by incentivising their intermediaries through the promotion mix (Armstrong, Kotler & Opresnik, 2011). This approach is referred to as a “push” strategy (see Figure 1), and its primary purpose is to increase repeat business at the expense of channel rivals (Dibb et al., 2012) while favourably developing the channel relationship.

*Figure 1. Example of the pull strategy versus the push strategy in the B2B market  
Adapted from Sandybayev (2019).*



Management may believe that push marketing builds strong channel relationships, which lead to loyalty and mutual profitability (Morgan & Hunt, 1994; Payne et al., 2017). The strategy is clearly beneficial for intermediaries as they receive competing and ever more lucrative deals. However, for manufacturers, while such promotions represent a continuous and necessary investment, they appear to have no persistent positive impact on sales (Nijs et al., 2001). They may even train intermediaries to become deal prone by shifting focus from the brand to the promotions (Scriven et al., 2017).

In B2C marketing, manufacturers who are at arm’s length from their users redress this balance by investing directly in consumer-brand relationships. These are designed to create demand - “pull” strategies (Figure 1). Pull marketing differentiates and builds consumer-brand knowledge through advertising, develops consumer loyalty with reward schemes, and attempts to strengthen consumer-brand relationships through continuous online interactions (Lim et al., 2019; Thaichon et al., 2020). Customer loyalty programmes provide a valuable platform for these interactions, and at their core, they share a common

## **Digital Loyalty Programmes**

purpose: to attract new consumers to the brand, lock in existing members (Dowling & Uncles, 1997; Juetten et al., 2006) and deliver competitive advantage from the data they collect (Grewal et al., 2011; Breugelmans et al., 2015).

Nevertheless, few have ever attempted to include an end-user digital loyalty programme in a B2B setting, largely because of the relatively smaller number of end-users to be served. Significant differences exist between B2B and B2C market (Zinkhan & Cheng, 1992; Liu et al., 2018). For example, impulse buying is unusual because B2B firms purchase raw material to fulfil derived demand. The buying decision depends on professional buyers and sellers (Jackson & Cooper, 1988; Oakley et al., 2021); orders are usually bigger and often more infrequent, sometimes scheduled using specialised software, while the initial sales process often takes considerable time. It may also involve fixed contractual binding and negotiations regarding technical support, credit, and delivery terms (Grewal et al., 2015). There is then an emphasis on customer retention (Dorotic et al., 2012) throughout the channel, and channel effectiveness then depends on leveraging relationships.

An end-user loyalty programme would offer a novel solution to many of the manufacturer challenges with channel marketing in this setting. For example:

- it would be relatively cheap to set up, using new digital technologies
- it would operate permanently, unlike campaign based promotions
- it would provide a continuous intervention against competing channel promotions
- it would add long-run value and interest for end-user members, who would accumulate points in a tiered membership hierarchy
- it would have the potential to improve relationships between manufacturer and distributor through regular data sharing and analysis

## **Loyalty Programmes**

Marketers use loyalty programmes hoping to retain their most valuable existing members. However, previous researchers who examined repeat purchase rates pre and post the introduction of a loyalty programme have found very limited evidence of “excess” behavioural loyalty when measured against stationary market models of buying norms such as the NBD-Dirichlet (Sharp & Sharp, 1997).

Like everything else in competitive marketing, they suggest that if one brand introduces a successful intervention, others must follow. In repertoire markets like grocery retail or consumer packaged goods where switching barriers are low, loyalty programmes generally attract those who stand to benefit the most: the heaviest shoppers. Since they already use several brands in the category over the course of a year, they often subscribe to several competing loyalty schemes. If, as Meyer-Waarden & Benavent (2006) conclude, loyalty schemes are simply more attractive to heavier rather than lighter users, then they become a cost of doing business without creating an advantage by segmenting the market, particularly if they do not attract or are not targeted at, lighter buyers.

## **The NBD Model of Repeat Buying**

In established B2C markets, near habitual repeat buying of consumer packaged goods has successfully been described and predicted at the aggregate level (i.e. across the customer base) with zero-order stochastic models. The most commonly adopted of these (Ehrenberg, 1959) is the NBD, which assumes

that population buying propensities are distributed gamma across all buyers, and the timing of their purchases is random around a fixed mean, following a Poisson distribution.

The NBD is simple to use to evaluate buying of a single brand or a category when buying is stationary. It is highly generalised and linked to empirical generalisations in repeat buying that has been widely tested and supported in many marketing contexts (Uncles et al., 1995) across North America, Asia, Europe, and Australasia. Recently, the NBD has been extended to different types of behaviour such as gambling (Lam & Mizerski, 2009) and mobile phone service (Lee et al., 2011). While the use of the NBD has been tested across various domains (e.g. Dawes et al., 2020; Trinh et al., 2014; 2016; 2018), its application in the B2B context has been limited to only a few studies. Some of these have suggested that since B2B customer behaviour is less random (especially within membership contexts), it may constitute a boundary condition (Sharp et al., 2002); thus, the model may *not* explain B2B behaviour well.

In the study of loyalty programmes, the NBD and its more complex relative the NBD-Dirichlet (Godhardt, Ehrenberg & Chatfield, 1984) provide a suitable benchmark to examine *divergence* from stationarity. For example, to demonstrate if a particular class of heavier or lighter buyers change in propensity resulting from adopting loyalty programme membership (Sharp & Sharp, 1997) and being rewarded for purchasing more. In any given time period, to calibrate the NBD, only two inputs are required. The penetration of a customer group within its category and the average purchase frequency in the given time. The model output then describes the distribution of buyer classes (1, 2, 3, 4...*n*), the repeat purchase rate and the customer acquisition rate between periods; in other words, the key measures of behavioural loyalty in the customer base.

## **Loyalty Programmes in Digital Marketing**

In a B2B setting, buyers are not always primary decision-makers. In many cases, professional procurement managers are moved from department to department with the express intent of discouraging buyer-seller relationships from being developed. Therefore, there may be a first-mover advantage for a manufacturer across its distribution channel in owning a B2B loyalty programme targeting end-user relationships to develop sales at the expense of rivals. While any competitive advantage offered by launching the first B2B loyalty programme may diminish over time, the benefit obtained by a constant flow of information about end-customer behaviour would still remain valuable (Palmer et al., 2000), continuing to provide leverage with the distributors.

The role of loyalty programmes has changed radically in recent years, owing to the web's immediacy and data-driven marketing. Today, customer loyalty programmes operate digitally with e-commerce and online payment infrastructure and reward members for various desired actions. The programmes have eliminated the need for physical cards, and digital evolution has made programme adoption much simpler (Smith, 2000). The other benefits brought by new technologies benefit marketers by providing detailed insights (Reyes-Menendez et al., 2018), identifying and targeting customised segments, and providing an interactive platform where customers and brands can see progress towards rewards (Leva & Ziliani, 2016).

Besides, the transition of loyalty programmes into the digital space has addressed some previously stated challenges. In comparison with traditional schemes, Leva & Ziliani (2016) state that online loyalty programmes may have distinct benefits: They can increase single-brand loyalty (O'Malley, 1998), provide a freestanding brand touchpoint (Lemon & Verhoef, 2016), keep the memory of brand fresh (Romaniuk

## **Digital Loyalty Programmes**

& Sharp, 2016), and intuitively they are good value for money (Leva & Ziliani, 2016). Therefore, online loyalty programmes may be more likely to increase loyalty and achieve the firm's desired objectives.

B2B manufacturer's products have a substantial impact on the quality and productivity of their end-customers' products. In their innovation, they should fully engage with their customers in parallel with channel partners (Wright et al., 2019). In B2B channel marketing, manufacturers have more motivation to create a relationship with intermediaries (Arnould et al., 2003; Sharma et al., 2020) and systematically offer profit sharing in the form of tiered and over-riding discount structures in return for larger purchase volumes (Leung et al., 2020). Compared with B2C, B2B marketing involves large orders from fewer customers, and it is more feasible for the seller to invest in these incentives (Zinkhan, 2001) with the distributor. But in addition, an end-user digital loyalty programme would help the manufacturer overcome high dependence on their distributors for transactional data. By promoting stronger end-user relationships in this way, manufacturers might also regain control over this data and use the insights it contains to manage channel relationships better.

Digital marketing has opened many opportunities for B2B marketers; however, scholarly research in this area is still at the embryonic stage (Vieira et al., 2019). Online schemes capture detailed customer information through various interactions across all channels – also known as big data (Stourm et al., 2020), through the integration of intelligent analytics and communication technology (Saura et al., 2017). Apart from interactive tools to connect with consumers (Chaffey & Smith, 2017), big data helps generate precise insights reflecting customers' behaviour (Pandey & Gudipudi, 2019). The two main limitations to further research here, particularly for stochastic modellers, would both be addressed by digital programmes in B2B marketing: the difficulties in obtaining B2B data from across channel partner sources and the thin volumes of that data because of the smaller customer base sizes (Lilien, 2016).

A principal objective in B2B marketing is to build channel partner engagement through repeat activity driven by end-user orders. The case for a cost-effective digitally-driven pull strategy in B2B seems quite clear if it could improve distributor and end-user acquisition and retention. In this chapter, we describe an investigation into the operation of such a programme over its first-year roll out, to answer the question;

## **IS A DIGITAL LOYALTY PROGRAMME A SUITABLE PULL STRATEGY IN A HEAVY INDUSTRIAL MARKET?**

### **Research Aims and Questions**

Existing research has not yet addressed channel marketing issues from a digital perspective (Thaichon et al., 2020), let alone in the B2B context (Liu, 2020). The aim here is to investigate whether knowledge of B2C relationship marketing can help industrial marketers achieve a firm's goals, by exploring how digital technologies can effectively enable B2B pull marketing. Such research would contribute usefully to the knowledge of industrial marketing.

Therefore the following research questions are proposed:

- *RQ1. Is a pull strategy appropriate in B2B marketing?*
- *RQ2. Is a loyalty programme an effective pull tactic in B2B?*
- *RQ3. Is this now possible by applying digital marketing practices?*

## Research Context and Dataset

A dataset provided by an industry-leading tools manufacturer and its marketing agency was used, containing sales data in the customer base over the rollout of an end-user loyalty programme. This scheme is one of the first in the heavy machinery industry and operates through a wide-ranging distributor network across the United States. The programme is live, but the data provided is historic and describes the first year of operation. All corporate buyers are anonymised in the files, identified only by coding, but sales can be associated with programme rewards and viewed in time series.

The programme was initiated with selected customers as a trial in the United States in 2018 then launched to the full customer base in 2019. The available dataset plots the development of member and non-member transactions as the scheme was first offered to a limited number of sellers in a trial, then a bigger pilot, then opened up and rolled out. The complete membership transaction records include the purchases of over a thousand corporate customers across seven product categories sold through a network of 90 distributors for a year. They can then be analysed at a continuous buying level in time-series aggregated by month or quarter.

## Programme Mechanics

The digital B2B loyalty programme offers points to end customers for purchases made in each calendar month that can be redeemed for manufacturers' products or other merchandise such as electronics and shop appliances. Points are awarded based on quantity purchased across multiple categories in a given month. Earnings per piece purchased are reset every month. Typically, customers earn more points for every additional category purchased, though the point's barriers vary across the categories.

The scheme has developed a 4-level customer tier programme with enhanced benefits at each progressive tier, usually accompanied by initial base points, point multipliers and anniversary gift points. This multi-tier scheme clearly distinguishes end-customer status (e.g. aluminium, steel, stainless, titanium) based on past purchase behaviour—two primary reasons are identified for this. First, membership in a particular tier provides customers with a sense of exclusive identity that can be converted into a tangible status attribute (McCall & Voorhees, 2010). Second, the tier system segments customers according to buying class (*heavy, medium, light*) to provide differentiated rewards (Rigby & Ledingham, 2004).

The reward scheme dashboard measures repeat purchase activity and offer information management and business analytics tools for manufacturers and end-users with an interactive website or application interface (Marjan et al., 2020). The manufacturer monitors business performance by accessing sales trends and real-time redemption information and can aggregate and visualise data from multiple sources. End-users enjoy exclusive benefits and can check their progress towards points and tiers, motivating them to interact with the platform to encourage higher conversion rates and higher revenues.

## METHOD AND ANALYSIS

To answer the three research questions, a multi-method approach was pursued to combine numerical measurement and in-depth investigation (Harrison & Reilly, 2011). Johnson and colleagues (2007, p. 123) provide a general definition of mixed-method research:

## **Digital Loyalty Programmes**

*“...the type of research in which a researcher or team of researchers combines elements of qualitative and quantitative research approaches (e.g., use of qualitative and quantitative viewpoints, data collection, analysis, inference techniques) for the broad purposes of breadth and depth of understanding and corroboration”.*

A mixed-method approach is suitable because analysing a loyalty programme based only on time series quantifiable indicators may not provide the contextual understanding that carries background information and complex assumptions beneath the numbers (Atieno, 2009). The inclusion of a qualitative approach can complement findings with inspiration for new ideas or possible explanations that can help sharpen existing theory (Siggelkow, 2007).

This study utilised a threefold empirical analysis. First, the transaction data for the rollout period was examined to uncover trends and associations within the data. Second, the data was then modelled using the NBD to identify any divergence from expectation, following the method adopted in earlier B2C studies. In the final phase of the study, the quantitative findings were explored in detail with the reward programme agency directors in-depth interviews.

**Stage 1 - Initial Observations.** To examine the data for any regularities, identify trends in repeat buying, and establish the roll-out dynamics, the sales data was summarised and tabulated in monthly and quarterly time series over twelve months. Run plots were produced to describe the shape of the scheme uptake and trends in top-line sales by value and by order volumes – purchase occasions. A number of loyalty-based marketing metrics were then established for each stage of the rollout: the penetration of programme members in the customer base, the relative average purchase frequencies of members and non-members at each stage, the repeat rates from quarter to quarter and the average product portfolio sizes across the manufacturer product categories. Initial comparisons could then be made simply between member and non-member buying from these observations.

**Stage 2 - Model Fitting.** In a second research stage, partly to extend knowledge of repeat buying, and partly to establish any unexpected deviations from stationarity, model fittings were made to the data at the final stage of the programme roll out, i.e. at the point that membership was self-selecting by the end-users rather than where it had been offered by the agency in partnership with the distributors to the “best” customers. At this point, the NBD was fitted to each month’s customer base sales data to establish its fit, and evaluate if and how repeat-buying at the manufacturer level was diverging from stationarity, perhaps as a result of the scheme.

**Stage 3 - In-depth Interview.** Finally, in-depth semi-structured interviews were conducted with the client account director at the agency. Interview topics were adapted from the gaps identified in a recent study by Chen et al. (2021), but allowed the discussion to develop in different directions to ensure depth and richness in responses. Discussion focussed on motivations for launching the loyalty scheme and the objectives set by the manufacturer for its performance. The discussion, conducted online, focussed on benefits for channel members obtained through the loyalty dashboard and the data it provides for the client. It focussed particularly on how the rollout of the digital reward programme helped the industrial marketer achieve its relationship loyalty objectives (Ojiaku et al., 2017).

The interview data were analysed under five themes:

- Motivations for launching the scheme
- Client and agency programme objectives
- Benefits to market intermediaries



- The insight obtained through the loyalty dashboard
- Solutions provided by the program to prevailing channel marketing issues.

## **RESULTS**

The analysis proceeded with an investigation of the research questions described in the previous section.

### **Push and Pull Strategy in B2B Marketing**

The first enquiry focussed on the appropriateness of a pull strategy in B2B marketing through a depth interview with the agency account director responsible for rolling out the loyalty programme for the manufacturer. Before moving onto pull strategies, the interview first examined push strategies in general to examine the motivation for the programme. The director suggested that it was still normal, even in the digital age, for:

*Representatives from manufacturers [...] to have face-to-face interaction with market intermediaries, to make the sales call.*

This is still a standard tactic through the channel in a push strategy, practised worldwide, especially with account-based marketing gaining traction in recent years. It is believed to be effective, particularly in upselling and customer retention. However, it is well-known that face to face selling is the most expensive method in the promotional mix due to costs associated with premises, travel, trade offers and training; it requires a large sales force to carry out personal selling successfully at scale, and it is time-consuming and has a limited reach in a given period.

The account director indicated another prominent issue with push strategies, that of data sharing:

*Typically, distributors have been very cautious of sharing details of their end customers over the fears of manufacturer bypassing the channels intermediaries and dealing directly with the end customer.*

He further added:

*Such practice has not been beneficial for the manufacturer since this incapacitated any honest, direct feedback.*

The arguments align with previous literature and highlight concerns that push strategies can be counter-productive for B2B marketers while necessary. Even where other promotional tactics are put in place, these may not translate into continuous repeat selling after the promotion period is over (Scriven et al., 2017). Other specific risks for marketing productivity in push strategies are noted in the literature:

- Retailers' hearty appetite for trade deals makes promotions expensive to operate with no long-lived change in buying patterns (Martín-Herrán et al., 2017).
- Large trade-deal expenses reduce manufacturer's profit margins and only permit a limited amount for further marketing activities (Lassar & Kerr, 1996).

## **Digital Loyalty Programmes**

- The focus on securing a one-time purchase hinders building relationship and reciprocity, and the results are likely to be short-term.
- The shifting market power to channel partners at the expense of the manufactures due to trade promotions; in return, increased dependence on the intermediaries (Aliawadi et al., 1995).
- Lack of interaction with end-user and difficulty in obtaining data affect the performance of critical production decisions (Leng & Jiang, 2016).
- Limited visibility of channel partner's transactional data decreases the opportunity for category growth. Manufacturers are unlikely to interpret and benchmark behaviour without such information (Wilkinson et al., 2016).

It was then argued that the fundamental challenge from the manufacturer's standpoint is how to compete more effectively and profitably in the B2B channel to achieve the firm's growth objectives, using push tactics alone.

Introducing digital loyalty programmes to the industrial customer base, a push strategy borrowed from consumer packaged goods marketing addresses many of the challenges identified. Loyalty programmes are cheap to set up, operate permanently, unlike price promotions, and accumulate loyalty by building points/tiers/hierarchies and providing additional information not available before. The account director adds:

*By offering this new kind of programmes not only do we get increased efficiency of the communication where we can be more frequent, lower cost and more meaningful, we can also give feedback and insights that we could not provide in the past.*

Establishing a programme means that the manufacturer firm can engage directly with customers and motivate their behaviours in meaningful ways. Using digital loyalty programmes, they can adopt multi-channel communication strategies (such as online and mobile devices) through membership data to encourage participation and retention.

The interview noted that loyalty programmes in the B2B industry are still a relatively new idea, therefore:

*Getting the first-mover advantage enables a firm to build a relationship quicker and deeper understand what customers want before competitors enter the arena.*

Having a unique platform that rewards buying gives the firm a competitive advantage. In summary, pull strategies appear to offer a route to sustainable competitive advantage – as the following example shows:

*Primarily because technology and innovation have opened numerous opportunities for operating the platform for the industrial clients.*

The benefits are threefold: "...the manufacturer benefits from consistent customer interaction and new insights into end-user behaviour. Distributors can incentivise category expansion and retention, allowing improved marketing strategy and the end-customer relish exclusive benefits and recognition from both manufacturer and distributor".

## Effectiveness of Digital B2B Loyalty Programme

To answer the second question is *a loyalty programme an effective pull tactic in B2B*, the available dataset was explored to evaluate the buyer behaviour outcomes as the programme was rolled out. Sales made to scheme members were analysed in three quarters over the first year of the programme operation, corresponding to the launch to widening customer base segments in three phases. Monthly sales *and* scheme membership remained largely stationary *within* each phase, and Table 1 describes the main buying metrics observed. In the left-hand section, the volume and value analysis of orders is shown, and on the right, the aggregated behavioural metrics; buyers in each period, and two loyalty metrics, average purchase frequency and month to month repeat rate of buyers.

Table 1. Summary time series analysis of sales and loyalty metrics

Near-stationary windows	Sales Metrics			Loyalty Metrics		
	Qualifying Sales	Qualifying Invoices	Average Invoice	Average Buyers	Average Purchase Frequency	Monthly Repeat
	\$.,000's		\$'s			%
July - September	21	147	148	6	23	92
November - March	231	666	345	37	18	93
June - September	845	2368	358	166	14	94

The table shows that programme sales grew rapidly as the scheme rolled out; from just \$21,000 in its first quarter, to over \$800,000 in its third quarter. The table also shows that not only did the scheme sales value grow, the average value of individual invoices to scheme members also increased by over two times.

Clearly though, looking at the right-hand side of the table, membership is the driver of programme revenue growth. The data show a dramatic and rapid fall in average purchase frequency, while sales and buyer numbers are highly correlated. Moreover, as the membership base grows in size, it holds a steady monthly repeat purchase rate, such that on average, around 93% of buyers in the membership in one month repeat in the next.

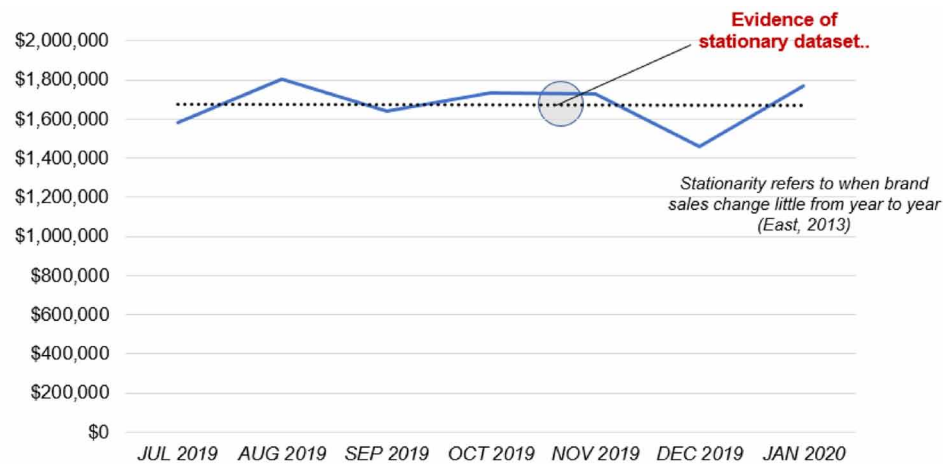
The membership is drawn from the existing buyers of the brand, and from across distributors. In the third window analysed, there are 166 buyers, which is 16% of the customer base of end-users. The findings are entirely consistent with the idea that the scheme is recruiting the brand's heaviest existing buyers. A near 100% repeat rate, a doubling of the invoice value, and near-stationary buying characteristics in each window all suggest little room for improvement in behavioural loyalty! The decline in purchase frequency is curious but may indicate either (1) a degree of order-bundling to obtain scheme rewards or (2) simply that the very heaviest buyers were recruited first. Further analysis was then undertaken to investigate the scheme in the context of the firm's total customer base.

First, the investigation was extended outside the scheme membership data to examine the shape of total brand sales through all distributors. Figure 2 shows a monthly sales analysis in time series for

## Digital Loyalty Programmes

the complete brand customer base - non-members and loyalty programme members - to identify any performance trend between July and January 2000. Across the period, total sales appear to be broadly stable – excluding a seasonal Christmas dip - meaning that although scheme sales are increasing, they are taking a bigger share of a stable whole. On the other hand, it is also possible to say that overall manufacturer sales are maintaining their value in the face of competition.

Figure 2. Evolution of sales revenues in the total customer base\*  
Customer base \* (n) = 1042 \*refers to both members and non-members.



Whether or not the loyalty programme has built additional sales for the brand has been examined in light of behavioural data; the results are mixed. One apparent reason is that sales remain stable in the customer base data; it is still hard to untangle the scheme's performance from the top line sales curve alone. This is because, under the surface of stability, significant buying fluctuations for different buyer classes and categories may exist that are worth exploring. An analysis of the total customer base would identify significant departures from the norms of stationary buying and, in comparison with the loyalty metrics of scheme members, whether the scheme was influencing loyalty in unusual and unexpected ways.

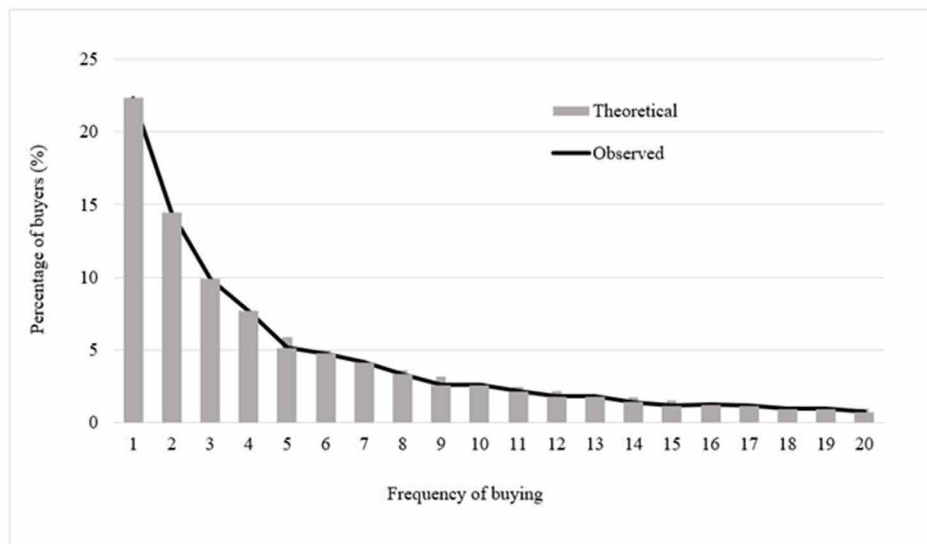
For example, there is some evidence that the scheme was changing buying patterns by encouraging order bundling – bigger but less frequent orders. The qualitative research had noted that:

*...customers were bulk buying to get better rewards at a reduced cost on freight.*

This might explain the declining purchase frequency because of less frequent orders and reflect increased efficiency due to the programme.

But fitting an NBD would establish whether the loyalty (the distribution of heavy and light buying across the buyer base) was anything other than what might be expected in a stationary situation. Given the stability in the top line sales data, NBD fitting was deemed appropriate for each month, and the estimations are summarised as an average monthly result for the final quarter of the analysis in Figure 3.

Figure 3. Customer base heterogeneity: average month  
 Customer base = 1042  $b = 0.40$ ;  $w = 9.9$   
 NBD Theoretical vs. Observed buying July 2019 to January 2020.



The model output (shown in the histogram) is a surprisingly close fit to the observed data (shown as the continuous curve). This, therefore, reflects several important characteristics about repeat buying in the B2B customer base and implies that the brand buyers are behaving as expected from the evidence presented in many studies. Notably though, the behaviour of the customer base as a whole is somewhat different from that of the programme members.

For example, where the membership buys every month (a 94% repeat rate on average), only 40% of the total customer base buy in any given month. The repeat rate is also far lower within each month, where the average customer purchase frequency in the membership is 14 orders each month; for the total customer base, that average rate is only 9.9.

The distribution is typically reverse-J shaped so that most buyers are lighter buyers than average: the most common order frequency is only once a month, the buying rate for nearly a quarter of the monthly customers. Therefore, the main finding is that programme members are not typical customers. In addition, the total customer base has not been skewed by particularly heavy buying to vary from the expectation. In short, there is evidence that the scheme may have increased order values for certain buyers, but it has not changed the distribution of purchase frequencies beyond what is expected.

Therefore, while a digital loyalty programme may be an appropriate pull tactic in B2B, it may not necessarily be an *effective* tactic if the objective is to adjust the loyalty curve's shape permanently. On the other hand, if the B2B customer base is similar to the B2C customer base in its repeat buying behaviour, the programme may deliver some unexpected benefits, which we discuss in the final section of the chapter.

## Advances through Digital Marketing

In answer to the third question, we asked whether advances in digital marketing could now make such programmes more widely applicable. These advances have created two critical opportunities for B2B

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organisations. First, a wide array of digital tools are available to target different customer segments. Second, those digital tools in combination with data science have made marketing initiatives more measurable by allowing marketers to access, gather, analyse, and report data (Järvinen et al., 2012; Pauwels et al., 2009; Saura, 2020), shaping knowledge-based decisions.

Since their inception, loyalty programmes provided relatively inexpensive means for firms to collect information about spending patterns (Hamilton & Howcroft, 1995). However, many traditional loyalty marketers did not seek to obtain transaction data in the past but simply rewarded behaviour in proportion to customer purchasing. Such programmes are less expensive to manage (because of no marketing dollars spent on the analysis) and hinder the opportunities to gain valuable customer insights, develop relationships, and have been seen as more tactical than strategic marketing tools (Palmer et al., 2000).

In order to inform our research question, we asked the agency whether new digital B2B loyalty programmes are more strategic as opposed to tactical. And if so, in what ways? The response:

*“They are both - we can lay a strategic framework for long-term relationship building but can also use tactical promotions and offers to drive behaviour”. With the digital advances, loyalty programmes have allowed the B2B firm more customer base segmentation opportunities because of the data it provides. The detailed analysis of customer profiles helps to identify different buyer classes and their distinct buying behaviour. Moreover, the manufacturer can now use this information to adapt and customise their product offer for individual segments. “...to increase category usage and consumption across the customer base, we set customised points and bundles together to engage and upsell to the segments had not actively bought before”.*

That is, the nature of the data delivered through loyalty can be used to improve performance and develop distributor and customer relationships.

In addition, digital loyalty programmes work as a useful tool for testing the effectiveness of different promotions much quicker –

*“It is easier to test and identify what offers customers respond to best”.*

The firm is now also able to have multiple touchpoint interaction. An example from account director follows:

*“We can now use the desktop, laptop, mobile, all social media channels to engage with the customer”. The marketers can spot the need for quick insight, “...if certain SKUs seem to be popular in one segment and not the other, instant data analysis can answer why the behaviour is happening the certain way”.*

The analysis can be cross-referenced over time and extend comparison by customer segments, size, geography and industry. The key to effective strategies will be learning from the loyalty programmes analytics platform (Saura et al., 2017) and understanding how to effectively target communication and manage channel offerings to maintain repeat purchases.

But the analysis of the customer base made here demonstrates the critical limitation of the scheme. The data analysed is only pertaining to the behaviour of the scheme membership and not to the non-members. While it may seem intuitively essential to manage the repeat buying of the most loyal custom-

ers, it may well be the case that they may find it hard to order any more often! Total sales also depend on the contribution of the lightest buyers, those least likely to be in the scheme.

The data analysis highlights the importance of a new focus, not on the repeat buying of the heaviest, but the acquisition of the lightest buyers into the scheme. Regardless of operating in a B2C or B2B market, brand growth usually comes by attracting many light buyers to the brand (Warc, 2021), and brand decline happens due to losing many light buyers. In this regard, the digital scheme could provide an excellent mechanism to interact with light buyers and incentivise their purchases, to reduce churn. If appropriately managed, the B2B marketers' vision should maintain heavy buyers but encourage light buyers to enter and stay in the scheme as a low cost means to "stay in touch" between purchases. This is more easily managed in B2B than in B2C.

Digital innovation provides additional opportunities to improve organisational learning, and leverage end-user knowledge (Abrell et al., 2016). For example, the online platform gathers information that can be used to develop a database to recognise buyer behaviour patterns (Zinkhan, 2001) and predict future purchase rates by incorporating the NBD. Most online platforms have integrated web analytics systems that analyse and report data to help understand users' activity (Saura et al., 2017). By studying corporate buying in this way, a loyalty platform can recommend future purchases and encourage upselling in other categories with customised offers and rewards.

The transition into the online platform and dataset availability has brought several benefits. Digital marketing is a catalyst for channel management (Dasser, 2019) because it builds new engagement networks that stretch back from end-user to manufacturer and allow a deeper understanding of the relationship potential. For example, the loyalty programme seems to be a cost-effective way of maintaining customers. Also, digital has opened lines of communication between a manufacturer and their end-users by providing means to communicate directly to members (Zhang et al., 2019) via applications, emails, direct messages, social media, push notifications. This has eliminated the reliance on intermediaries for customer information and transaction assistance that was not possible using traditional push strategies of the past (Mudambi & Aggarwal, 2003).

## **DISCUSSION**

This chapter analysed the launch of a novel B2B channel strategy supported by advances in digital marketing – we set out to find answers to three research questions: 1) Is a pull strategy appropriate in B2B marketing? 2) Is a loyalty programme an effective pull tactic in B2B? 3) Is this now possible by applying digital marketing practices? The research used sales data from a newly launched loyalty programme and in-depth interview with agency directors to answer the questions.

For many, the appropriate marketing strategy in B2B sales involves push tactics to move goods through distribution channels towards end-users by squeezing competitors out of the way. Typically, these tactics include short term volume and price promotions, face to face interactions, and sharing of resources in order to build relatively stronger distributor relationships. These tactics are likely to produce volatile and short-run outcomes because they are usually matched by the rival brands in the same channel, who then regain lost ground. In B2C markets, these efforts are augmented with pull investments designed to create end-user demand, usually advertising or promotions, and again often with only short-term results that serve only to maintain a long-run equilibrium rather than persistent growth. Pull investments are ap-

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appropriate in B2C markets where efficiency is gained through one-to-many investments in the context of “arm’s length” customers. Our first question is whether the same tactics are appropriate in B2B markets.

An advantage of the loyalty programme as an end-user pull strategy is that it is designed to build a competitive advantage for the brand in the form of incentives, and those incentives are related to performance. That means that marketing investment is more closely aligned with profitability and, therefore, more efficient. A second advantage is that the marketing pressure applied is continuous in the context of a complex marketing channel where a manufacturer has become separated from the end-user through a distributor network; a loyalty programme makes excellent sense if it rebuilds links with end-users and provides a means to incentivise the intermediaries in addition. It resolves precisely the same challenge faced by B2C marketers, as our interview has demonstrated.

Second, we used a model associated with B2C marketing to evaluate the behaviour of the B2B customer base. We showed that the early adopters of the programme were the heaviest buyers in the customer base, and this is hardly surprising given they have the most to gain. Nevertheless, membership is relatively low a year after launch, and across the total customer base, the scheme appeared to have left the regular distribution of purchase frequencies unchanged. Although the loyalty of heavy buyers might seem to be immune to management, the fact that the NBD gave such a close fit points up a crucial lesson: every customer base has far more light buyers than heavy, and in total, they contribute an important sales volume.

Sales from light buyers are neither optional nor dispensable. In many ways, this presents a more complex marketing challenge than that posed by the few heaviest customers. Brands grow and decline by gaining and losing large numbers of the lightest buyers, and yet here; the loyalty programme is not reaching this part of the customer base. If it did, it would offer a cost-effective solution to the problem of keeping the brand mentally available in the mind of the industrial buyer, particularly where the purchase interval is prolonged. It should help the brand stay in touch with all of its customers. A loyalty programme is uniquely placed to implement this strategic pull task because it is a continuous mechanism and not a campaign-based tactic.

Finally, we asked if the advances in digital science would make the implementation of a reward scheme more efficient. Whether in B2B or B2C, managers look for new ways to increase business efficiency (Berry & Rondinelli, 1998; Abubakar et al., 2019). Interventions through data-driven loyalty programmes allow opportunities to analyse customer base data and take prompt actions, test promotional effectiveness, segment buyer classes. These schemes provide means to interact not only with heavy but also the infrequent buyers. Moreover, an online loyalty programme creates an owned, incremental and engaging brand touchpoint relevant for all customers (Lemon & Verhoef, 2016) even if it is only actively targeted at the most loyal. Engagement with scheme by heavy and light buyers is refreshing brand memory structures (Romaniuk et al., 2013) even if a purchase does not immediately follow, maintaining brand salience among the membership. Online loyalty programmes should be broadly not narrowly targeted among the customer base to achieve higher reach for the brands they promote. This would more likely contribute to the overall brand growth (Sharp et al., 2009; Sharp & Sharp, 1997).

## **THEORETICAL IMPLICATIONS**

The NBD fit to the B2B loyalty programme context suggests that the model is robust and practically useful here. In addition, its reverse-J shape reflects the fact that most buyers in B2B as in B2C are far



lighter than the average purchase rate. Consistent with previous loyalty programme literature, the NBD fit proposes that industrial purchasing follows similar repeat buying patterns as B2C, contrary to some prior commentary, which has suggested that regular timings of orders might constitute a theoretical boundary condition (Sharp et al., 2002)

This chapter extends the application of the NBD model, which has seldom been applied in manufacturing and industrial goods markets before (although one recent exception is Wilkinson et al., 2016). The findings extend knowledge of several important buying characteristics to the industrial customer base and imply that the brand buyers behave as expected from many similarly close fittings. Particularly here, though, the behaviour of the customer base as a whole is to a certain degree different from that of the membership base, which in this case appears to consist only of the brands heaviest buyers.

We also highlight an increase in business efficiency as B2B customers began to bundle their purchases into bigger but less frequent orders to save shipping costs in order to enjoy exclusive rewards. Thus, the scheme motivated *some* end-customer behaviour; however, overall buying propensities remained essentially unchanged.

By capturing interview insights, we acknowledge managerial objectives and motivation to launch the scheme to the industrial customer base, its benefits to the channel partners, and the solution pull strategies can provide to industrial manufacturers. The chapter value contributes to understanding the use of big data insights obtained through the loyalty dashboards that support manufacturers to innovate and overcome prevailing channel marketing issues. Moreover, such innovation can help the B2B firms to identify commercially valuable patterns to supply critical knowledge of channel partners and transform customer experience at the end of the value chain – i.e. the end-customer (Wright et al., 2019).

## **MANAGERIAL IMPLICATIONS**

B2B firms' nature towards marketing planning and decision making based on intuition, flexibility, and experience may be challenged by the formalised nature of digital loyalty programme data and the analytics it combines (Armario et al., 2008). Going forward, managers need analysis and interpretive expertise to create unique insights into consumer behaviour to reap the maximum benefits of programme launch. The key insight here is to recognise the value of light buyers and adapt the scheme to offer incentives to this group, which make the scheme relevant. In line with current thinking, digital loyalty programmes are a flexible, relatively cheap and efficient marketing instrument.

The digital B2B programme allowed the manufacturer to reach the distributor's customer and worked backwards to the end-user. This generated data-driven insights for the manufacturer, offered rewards for the end-customer, and created a demand pull. In conclusion, B2B managers should not hesitate to launch loyalty programmes as they make channel marketing more efficient and facilitate technology-enabled dialogue between the manufacturer and the end customer. But they should be managed for the whole customer base, not the few heavy buyers that constitute around 15% of it, enabling attractive rewards and offers targeted towards the lightest, most infrequent buyers.

In summary, the initial evidence has highlighted the value of digital loyalty programmes for B2B marketers. Managers must consider loyalty programmes performance in the round: do competing manufacturers have rival schemes, can they provide more opportunities for upselling and engagement among channel partners, do they have the potential to manipulate order size and reduce costs through bundling?

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The actual value for B2B marketers is not in creating data warehouses through digital schemes from which they can *mine* potentially helpful information (Palmer et al., 2000). However, it lies in using big data in analysing and identifying commercially valuable patterns or relationships to supply critical competitive knowledge to all channel partners. Knowledge of these recurring patterns helps management because, in the form of empirical generalisations or simple models, they can predict the likely outcome from a given level of investment.

## **CONCLUSION**

Loyalty programmes may be seen as old fashioned, and they have been frequently criticised in the literature as doing little to manage loyalty which generally follows predictable patterns. This study examined the rollout of a new and innovative digital loyalty programme in an unfamiliar context, a heavy industrial setting where a major manufacturer reaches the end-user through a distributor network.

We found that a familiar model of consumer behaviour, the NBD, worked well to describe the distribution of purchase heterogeneity in the B2B brand's customer base. However, its assumption of stationarity remained intact – in other words, the scheme was unlikely to have changed the buying propensities of existing customers.

On the other hand, this drew attention to another aspect of industrial buying, the predictable nature and importance of the lightest brand users. A digital loyalty programme makes an excellent and appropriate tool to deal with the vital marketing task of maintaining pressure on this large group of customers at a low cost if it can be diffused across the whole customer base.

## **LIMITATIONS AND FUTURE RESEARCH DIRECTIONS**

This study produces novel insights into the value of digital loyalty programmes in the industrial buying context. A number of limitations suggest that further research is required that builds upon the results and addresses gaps of the study.

The first limitation stems from the data used—the analysis comprises smaller and inconsistent B2B datasets between programme membership and the entire customer base. Future researchers could incorporate rich longitudinal digital data to help assess schemes' ability to build sales and loyalty for an extended period. Assessments can also be extended to loyalty website and mobile application interface to test whether engagement is predictable (Graham et al., 2021) and if the expected engagement can be modelled on long-term repeat activity to compare against the NBD norms. Such research will contribute to online behaviour knowledge, specifically regarding the predictability of acquisition and engagement to online loyalty programmes.

Secondly, the conclusions are limited to a single brand loyalty programme. In order to test scientific validity and strengthen the generalisability and robustness of the NBD model, future research is now desirable to conduct a replication study at another, or better, at several industrial loyalty schemes simultaneously. Longitudinal B2B membership data reporting usage occasions from a wide range of firms would be preferable. If available across the B2B industry, this data would allow a greater number of brands to be studied; and a category-level NBD-Dirichlet to be fitted, from which benchmarks for a wider range of behavioural metrics could be estimated. Such analysis is crucial for marketers better to

understand the nature of competition in their market. The NBD fits well in extended time periods of continuous buying (Dawes et al., 2020), and this warrants extension from B2C into B2B.

Lastly, further work could consider the privacy concerns associated with loyalty programmes data that have received little academic attention to date. Digital loyalty programmes have opened doors of incredible opportunities for B2B managers with the rapid growth of big data, market intelligence and the precision of micro-targeting they provide (Donnelly et al., 2015). By nature, such programmes gain insights from the large amount of data they collect daily; however, not much is known regarding end-customers willing to share their activity information to receive personalised offerings and communication (Saura et al., 2021). Gaining such understanding is crucial as firms increasingly pay attention to satisfying member's privacy rights and regulators strictly scrutinising ways marketers approach targeted communication in some industries. A recent example is regulations imposed on bookmaker firms in Great Britain to control the use of the VIP schemes data (Gambling Commission, 2020).

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## KEY TERMS AND DEFINITIONS

**Channel Marketing:** The job of administrating market intermediaries (wholesalers, distributors, retailers) to achieve manufacturer’s distribution objectives (Rosenbloom, 2007).

**Empirical Generalisation:** A fixed relationship between variables that regularly occurs; hence they describe what tends to happen to x if there is a given change in y. Such knowledge is useful for theory building or making routine predictions (Sharp et al., 2017).

**Loyalty Programmes:** Structured marketing efforts designed to encourage behavioural loyalty to the brand by rewarding members with incentives such as points redeemable for prizes or discounts (Uncles, Dowling & Hammond, 2003).

**Negative Binomial Distribution (NBD):** The NBD theory is a mathematical model used to predict future purchase patterns for a single brand or category from data on purchase frequency and penetration for any given period (Ehrenberg, 1988).

**Penetration:** The proportion of all buyers under investigation who buy brand x at least once in a period, measured in percentage (Wilkinson et al., 2016).

**Pull Strategy:** A promotional strategy focuses on facilitating communication flow directly from a manufacturer to end customers to create a demand “pull” for products suitable for their needs (Brocato, 2010).

**Purchase Frequency:** The average number of purchasing made by those who purchase *at least* once in a period (Wilkinson et al., 2016).

**Push Strategy:** A traditional trade marketing strategy used to “push” manufacturers products through the channel by incentivising market intermediaries rather than end customers through the promotion mix (Armstrong, Kotler & Opresnik, 2011).

**Relationship Marketing:** Marketing efforts designed to establish, retain and enhance long-term relationships with a firm’s existing customers to increase profitability (Grönroos, 1994; Peterson, 1995).

## Section 2

# Towards Practitioner Knowledge: Applied Digital Marketing Strategies

*In order to understand how practitioners should develop digital marketing actions in their industries, this section presents several chapters that analyze from a business point of view the main actions linked to decision-making that CEOs, executives, and other company managers have to consider for the development and optimization of data-centric digital marketing techniques.*

## Chapter 5

# Alibaba's International Digital Marketing Practices and Strategies

**Sue Claire Berning**

*University of Ingolstadt, Germany*

### **ABSTRACT**

*In this chapter, the main relationship between a company's use of data-driven methods and its international digital marketing strategies are examined. In particular, the question of how data-driven methods, like consumer analytics, helped the company in its internationalization efforts are outlined. By following the case study approach, the diverse digital business models, online advertising campaigns, and international digital marketing practices of the Chinese company Alibaba are investigated. As China's e-commerce market currently became one of the most dynamic ones in the world, and as Alibaba is one of the leading internet and e-commerce corporations worldwide, valuable insights are provided. Moreover, Alibaba's international digital marketing practices, underlying strategies, as well as adaptive capabilities are systematically analyzed. In addition, Alibaba's competitive behavior is investigated and compared with international companies and peers. In this context, the standardization versus adaptation paradigm is also revisited.*

### **INTRODUCTION**

During recent years, the digital economy has rapidly grown both in Western and Asian countries as well. Especially in China, a tremendously fast increase happened. Consequently, China became one of the biggest e-commerce markets in the world, for example by having 120% of compounded annual growth from 2003 to 2013 (Kwak, Zhang & Yu, 2019). Therefore, the developments of digital markets, digital business models and digital marketing strategies and practices of Chinese companies in China and worldwide provide interesting and relevant insights for professionals and researchers alike.

The aim of this book chapter is to give a comprehensive overview of the international digital marketing strategies and international expansion of the Chinese company Alibaba by analyzing its key success

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factors. There exists several papers on Alibaba's development, its founder Jack Ma, its strategic decisions and expansion (e.g., Kim, Zhang & Zhang, 2016; Hu & Chang, 2019; Yun, Zhao, Park & Shi, 2020), however, a paper focusing on Alibaba's latest internationalization activities regarding digital marketing practices and expansion is missing.

Further, the relationship between data-driven methods and Alibaba's international digital marketing strategies is examined. In particular, the question how Alibaba's international digital marketing strategies benefited from the use of data-driven methods like consumer analytics is investigated.

The structure of this book chapter is as follows. After a literature review, a short overview of the Alibaba Group, the huge digital ecosystem that Alibaba built in an unprecedented speed and manner is outlined. This digital ecosystem is the foundation of Alibaba's enormous success, nationally and internationally. The digital business models of Alibaba are described as well.

Then outstanding key points describing the strategist Jack Ma are delineated. His strategic decisions and approaches right from the start, as well as online advertising campaigns are described.

The main part include the systematic description of Alibaba's international digital marketing practices, the underlying strategies, as well as the international expansion. All marketing mix elements (product, price, place, promotion) are analyzed in detail. Further, the different internationalization entry modes applied by Alibaba are discussed. In addition, the innovative approaches of Alibaba how digitalization and data-driven methods can enhance its international businesses are covered as well. The chapter ends with a discussion, limitations, future research directions as well as concluding remarks.

This book chapter might contribute to current knowledge in several ways. By following the case study approach, operation practices of a very successful company are examined. As the roots of Alibaba and its management lie in China, a non-Western way and view of doing business is presented.

In addition, the relationship between data-driven methods, like Big data and consumer analytics, and adaptive capabilities in international marketing activities is carved out.

Further, Alibaba's success in international markets is largely based upon its success in China. An analysis of the approach of how far domestic successful marketing practices could be transferred to foreign markets is therefore included in the paper.

Moreover, Alibaba's competitive behavior is investigated and compared with international companies. In this context, the standardization vs. adaptation paradigm is revisited.

## **LITERATURE REVIEW**

The literature on digital marketing, especially on the role of data-driven methods grew constantly in recent years (see e.g. Kannan & Li, 2017; Dwivedi & Kappor & Chen, 2015; Koiso-Kanttila, 2004). Data-driven methods and technologies can help capture rich and plentiful data on consumer phenomena in real time. The process of extracting consumer insights from Big Data became ever more important in recent years (Lycett, 2013; Mithas, Lee, Earley & Murugesan, 2013). Hence, the study of consumer analytics lies at the junction of Big Data and consumer behavior (Weber & Henderson, 2014). Consumer analytics is defined as the extraction of hidden insights and patterns of consumer behavior from Big Data and the use of these insights (Erevelles, Fukawa & Swayne, 2016).

Tech-savvy organizations have started to use Big Data with the goal to improve their decision-making, their agility, and their customer-centric approaches (George, Haas & Pentland, 2014; Camilleri, 2020). They use analytics to identify how exogenous variables, like the broader economy, competitive offerings,

or the weather can affect consumer sentiment toward products and brands (Cambria, 2016), as well as their organizational performance (Akter et al., 2016). By collecting and storing data from each and every customer transaction they use analytics to customize and personalize their offerings and improve their customer engagement (Grover et al., 2018; Ransbotham & Kiron, 2018).

Successful marketing strategists exploit these customer insights by translating them into market advantages (Camilleri, 2020). Even though Big Data is considered a new form of capital (Mayer-Schönberger & Cukier, 2013), many companies fail to exploit its benefits as the right interpretation and consequent uses need skillful managers and fast reactions, thus specific dynamic and adaptive capabilities (Mithas, Lee, Earley & Murugesan, 2013).

In extant literature, the process of using consumer analytics to understand consumer behavior is only seldom connected to the process of utilizing consumer insights to enhance dynamic and adaptive capabilities. Focus is laid on the latter process. A company's capability to respond to changes dynamically incorporates skills and knowledge embedded within the company to alter existing resources and create new value (e.g., Teece, 2007; Day, 2014; Kozlenkova, Samaha & Palmatier, 2014). A company using novel consumer insights extracted from Big Data to understand unmet consumer needs enhances dynamic capability (Erevelles, Fukawa & Swayne, 2016). When companies are proactive in responding to changes in the external environment by capturing even weak signals from consumers to predict market and consumer trends, their adaptive capability is strong (Day, 2014). When successfully exploited, Big Data provides firms with opportunities to enhance adaptive capability (Erevelles, Fukawa & Swayne, 2016).

Both dynamic capability and adaptive capability achieved through consumer analytics facilitate value creation in diverse marketing activities (Ambrosini & Bowman, 2009; Day, 2011). In particular, value is created as a result of improved decision making enabled by Big Data. For example, consumer insights enable advertisers to better measure and improve the effectiveness of digital advertising (Bharadwaj et al., 2013). Overall, better understanding customers through Big Data improves the effectiveness of existing marketing activities (Story, O'Malley & Hart, 2011; Baesens et al., 2014).

The internationalization process of companies has been changed in various aspects through digitalization, too. In order to face the challenges of the internationalization, companies need to understand thoroughly the new digital business environment, including foreign markets and customer insights (Barton & Court, 2012; Berthon et al., 2012).

Big Data as the new source of knowledge can help companies convert business information into competitive advantages in the global market (Côte-Real, Oliveira & Ruivo, 2017). Although the topic of Big Data receives much attention from researchers, the adoption of Big Data in internationalization is still an emerging research interest how Dam, Dinh & Menvielle (2019) found in their systematic literature review on Big Data adoption in internationalization. Therefore, in the following the relationship between consumer analytics and adaptive capabilities in international marketing activities is analyzed by taking a closer look at the Chinese company Alibaba.

## **COMPANY OVERVIEW**

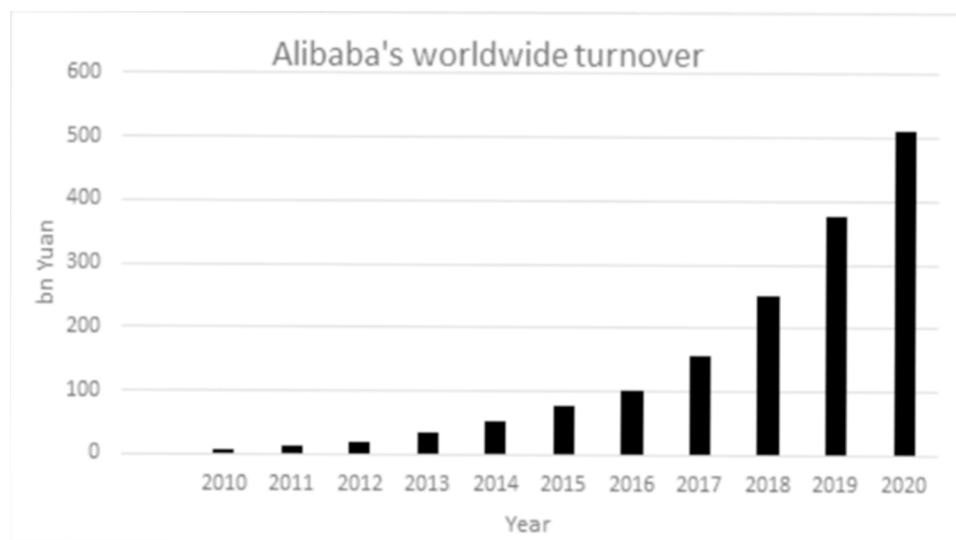
Alibaba Group Holding Limited (Alibaba) is often cited as one of the most successful and most innovative Chinese companies (e.g., Yip & McKern, 2016). In 2019, Alibaba was the Chinese company with largest market value with around 480.8 billion US dollar, and the second most valuable retail brand in the world just behind Amazon (Textor, 2020).

## Alibaba's International Digital Marketing Practices and Strategies

Alibaba is one of the biggest e-commerce companies worldwide specializing in retail, internet, and technology. For the fiscal year ending March 31, 2020, Alibaba had 780 million consumers in China and over 180 million consumers outside China. The total revenues were more than 509.7 billion RMB (around 73 billion USD) (see Figure 1), and a year-over-year growth of its core commerce revenue of 35% and of its cloud computing revenue of 62% (Alibaba Fiscal Year 2020 Annual Report, 2020).

After its initial public offering at the New York Stock Exchange in September 2014, Alibaba's market value was 230 billion USD – more than Amazon and eBay taken together (Anwar, 2017). Founded in 1999 in Hangzhou, Alibaba has had in 2020 more than 117,600 employees in more than 70 cities worldwide (Alibaba Fiscal Year 2020 Annual Report, 2020).

Figure 1. Development of Alibaba's total revenues worldwide (Source: Statista 2020)



## Alibaba's Ecosystem

In 1999, Alibaba started with launching **Alibaba.com** and **1688.com**, two business to business (B2B) online trading platforms for small and medium sized businesses. Alibaba.com is geared toward global wholesale trade, while 1688.com is targeted at wholesale trade for the domestic Chinese market (Alibaba Fiscal Year 2020 Annual Report, 2020). In China, both the numbers 6 and 8 symbolize good fortune due to their similarities in pronunciation with the respective Chinese words.

Four years later, Alibaba established **Taobao**, a platform which enables online shopping from consumer to consumer (C2C). Taobao also facilitates individual entrepreneurs and small businesses to open online stores, and can be seen as a direct competitor to eBay as it follows the same digital business model.

In 2007, Alibaba's monetization platform **Alimama** was launched. Alimama is an online marketing technology platform offering sellers of Alibaba's marketplaces digital marketing services for both personal computers and mobile devices.



One year later, **Tmall** was launched to complement Taobao Marketplace. Tmall focuses on business to consumer (B2C) online shopping of big brands and retailers.

Another subsidiary of Alibaba was established in 2009, **Alibaba Cloud**. Alibaba Cloud provides cloud computing services to online businesses and Alibaba's own e-commerce ecosystem.

In 2010, **AliExpress**, the third digital consumer marketplace was launched. AliExpress is a global transaction-based retail website that allows smaller buyers to buy small quantities of goods at wholesale prices with a fast delivery.

In 2013, Alibaba established **Cainiao** Network together with its business partners, six large Chinese logistics companies. For delivery of packages in China, this network grew to 14 local logistics companies within one year.

In 2014, **Alipay**'s parent company Ant Group was formally established. Alipay is an online payment platform providing an escrow service as well, often compared to PayPal as it offers the same digital services.

In 2017, the first **Freshippo** (known as "Hema" in Chinese) store was opened. Freshippo is Alibaba's proprietary grocery retail chain leveraging New Retail to converge online and offline shopping by having for example, unmanned checkout kiosks, mobile-scanned product details, or fast-running fulfillment conveyor belts. Freshippo wants to offer its customers digitally enabled grocery-shopping experiences with just one mobile app (Wang, 2020).

Other digital platforms belonging to Alibaba are **DingTalk** (a communication and collaboration platform), **Ele.me** (a leading on-demand delivery and local services platform), **Youku** (an online long-form video platform), **Juhuasuan** (a group shopping platform for Chinese customers), **Lazada** (an e-commerce platform in Southeast Asia), **Fliggy** (formerly known as Alitrip, an online travel platform), **Alibaba LST** (a one-stop shopping platform for ordering, logistics, marketing and other services for offline retail shops), **Kaola** (an import e-commerce platform), and **Damai** (an entertainment ticketing platform). Table 1 gives an overview over Alibaba's businesses.

The business model of Alibaba consists of providing a digital market place which connects sellers and buyers and of generating income from the arrangement of transactions. It does neither compete with its sellers nor service providers. The growth strategy consists of increasing the number of customers and their spending, the number of product categories, as well as the spreading of online trade (Alibaba Fiscal Year 2020 Annual Report, 2020).

At the core of Alibaba's business model is the group of online business platforms which are supported by the cloud computing system. They enable transactions and facilitate numerous functions for suppliers, customers, app developers, and related service providers. For instance, Taobao provides its online search engine for users to find the product or service they want. Hence, it builds a network between buyers and sellers and serves as a platform where they make transactions (Wu & Gereffi, 2018).

One crucially important complement for facilitating online transactions was Alibaba's decision to provide financing. On the one hand, Alibaba helped small and medium sized businesses to gain access to financing by providing banks with their transactions and trading records. Without Alibaba using small and medium sized businesses' data and forwarding these data to banks Alibaba's e-commerce platforms would never have become such a success. On the other hand, Alibaba started its own loan business for small and medium sized businesses with **Sesame Credit**, China's first credit agency (Scheuer, 2018).

## Alibaba's International Digital Marketing Practices and Strategies

Table 1. Overview of Alibaba's businesses (Source: own compilation)

<p>Core Commerce <i>China</i></p> <ul style="list-style-type: none"> <li>■ <b>Retail Commerce:</b> Tmall, Taobao, Freshippo, Tmall Supermarket, AliHealth</li> <li>■ <b>Wholesale Commerce:</b> 1688, Lingshoutong</li> </ul>	<p><b>Core Commerce</b> <i>International</i></p> <p><b>Retail Commerce:</b> AliExpress, Lazada, Tmall Global, Kaola</p> <p><b>Wholesale Commerce:</b> Alibaba</p>
<p><b>Digital Media and Entertainment:</b> Youku, Alibaba Pictures, Xiami Music, Damai, Shuqi</p>	
<p><b>Consumer Services:</b> Ele.me, Koubei, Fliggy</p>	
<p><b>Innovation Initiatives:</b> amap.com, DingTalk, Tmall Genie</p>	
<p><b>Logistics Infrastructure for Core Commerce and New Retail Initiatives:</b> Cainiao, Fengniao Logistics</p>	
<p><b>Marketing Services and Data Management Platform:</b> Alimama</p>	
<p><b>Payment and Financial Services Infrastructure:</b> Ant Group</p>	
<p><b>Technology and Systems Infrastructure:</b> Alibaba Cloud</p>	

Another essential component of Alibaba's success is its investments into logistics. Its **Cainiao** Smart Logistics Network exemplifies Alibaba's innovative mindset and strategic advancements. Cainiao speeds up the digitization of China's logistics industry by connecting smart devices, warehouse and delivery robots with algorithm-based management systems. The flow of parcels ordered online is digitally managed along all steps of the logistics value chain. This includes parcels tracking, robot- operated warehouses, automation technologies, delivery drones, driverless delivery robots, as well as pick up stations and lockers working with facial recognition for opening (Campbell, 2020).

Overall, Alibaba's digital market places are very successful in attracting millions of buyers and sellers worldwide. By concentrating on combing online platforms, financing, and data services, Alibaba has built a huge ecosystem of platforms, connections, and agreements for logistics, advertising, marketing, and cloud computing.

## THE STRATEGIST JACK MA

A lot of information and articles can be found about the founder of Alibaba, Jack Ma (e.g., Grosse, 2012; Kim, Zhang & Zhang, 2016; Hu & Chang, 2019; Zhou, Kim & Rui, 2019). His personal history and background as a failed and not very successful English teacher, his personality characteristics as visionary and entrepreneur, as well as his management style and philosophy are described and analyzed in numerous studies.

An outstanding attribute of Jack Ma is his clear strategic thinking and strategic business approach. Reflecting his innovative and far-sighted attitude, some examples will follow to illustrate Jack Ma's strategic decisions which were crucial for Alibaba's successful development.

First, before determining a company **name** Jack Ma discussed with American friends several ideas because he wanted to build in the long run a truly global company and their assessments as potential English-speaking buyers was essential. By finally choosing 'Alibaba', he could even get two goals in

one go: Alibaba is easy to remember for an international audience, and is actually listed in alphabetical order before his biggest competitor Amazon (Scheuer, 2018).

Second, right from the beginning of Alibaba Jack Ma put the focus clearly on **small and medium sized enterprises** (Anwar, 2017). This explicit target group concentration combined with the aim to provide a digital trading platform for the companies that entered his online database proved to be the right decision.

Next, one key success factor for Jack Ma was his deep understanding of **Chinese customers** and his derived conclusions there from. For example in 2004, his powerful US-American rival eBay entered the Chinese market. eBay transferred its American principle of selling the products via auctions to China without any adaptations, following an absolute standardization approach. Equally, the internationally used product categories were just copied to the Chinese market in an unchanged way (Scheuer, 2018). However, these standardized concepts did not work in China. Jack Ma's prompt reply to eBay was not only the incredibly fast foundation of Taobao but also the quick adjustment and adaptation to Chinese customers' preferences: Jack Ma realized that Chinese customers were not used to the bidding on auctions and mostly overstrained, so as a reaction he offered the majority of products for direct sale very soon. Additionally, he adjusted the arrangement of product categories in such a way that they followed the same scheme Chinese customers knew from their local department stores. These digital marketing techniques proved to be very successful. After two years, Taobao had managed to dominate the Chinese market with a market share of 67%, while eBay only held 29% (Shao, 2019). This leading principle of Alibaba of adaptations of foreign products and services to the Chinese market is seen as a crucial success factor, and can be interpreted as a further extension of the standardization versus adaptation paradigm of the international marketing literature (Ryans, Griffith & White, 2003).

Another example of Jack Ma's strategic skills is the idea of the "**Singles Day**" on 11.11. (Chen & Li, 2019). This online advertising campaign is by far one of the most successful ones. Lonesome single students in China's big cities formed that date due to the many ones / single digits as day of the singles. Alibaba took up that idea and persuaded the city youth that this day should be celebrated by abundant online purchases. With a mixture of incentives and compulsion, Alibaba induced its sellers to advertise with big discount campaigns on 11.11.. For many companies, 11.11. became even more important than the Chinese New year and pre-orders are placed months ahead. Hundreds of thousands of parcel deliveries congest the cities every year shortly after 11.11.. The development of online purchases on 11.11. shows that Chinese consumers spent 3.04 billion USD in 2012 on Alibaba's e-commerce platforms and this went up in 2020 to 74.1 billion USD (Ma, 2020). Alibaba hosts a grand gala for the Singles Day with international guests' appearance demonstrating its efforts to make it a holiday.

## **INTERNATIONAL EXPANSION**

Right from the start, Alibaba set itself global aspirations and global goals (Anwar, 2017). This is also reflected in Alibaba's mission: "To make it easy to do business anywhere". In order to achieve this, Alibaba follows different approaches by focusing on different target groups.

Alibaba was able to build up a solid base for its global expansion with its growing business in China. With its first website, Alibaba.com, Alibaba successfully managed to connect **Chinese buyers** with international sellers (Wu & Gereffi, 2018). In addition, with Tmall Global and Kaola, Alibaba addresses the growing Chinese consumers' demand for international products and brands by offering high quality

imported products, premium services, and an interactive online shopping experience (Alibaba Fiscal Year 2020 Annual Report). Examples of foreign companies selling on these platforms include Aldi, Henkel, Adidas, WMF, Bosch and Zalando, as well as Mondelez, Nestlé, IKEA and many others.

Further, in order to target **consumers worldwide** by enabling them to buy directly from manufacturers and distributors in China, AliExpress became the global digital marketplace. At the end of 2017, the AliExpress platform served more than 100 million customers (Scheuer, 2018). Beside to the global English language version, AliExpress is available in eleven other languages (Russian, Portuguese, Spanish, French, Polish, Hebrew, Italian, Turkish, German, Korean, and Arabic) (AliExpress, 2020). Top consumer markets where AliExpress is particularly popular are Russia, Brazil, the USA, Spain and France (Alibaba Fiscal Year 2020 Annual Report).

Moreover, Alibaba.com is China's largest integrated international online **wholesale** marketplace by revenue since 2019. It connects online Chinese and overseas sellers to overseas wholesale buyers, such as trade agents, wholesalers, retailers, manufacturers and small and medium sized enterprises. Alibaba offers sourcing, online transaction, digital marketing, digital supply chain fulfillment and financial services to these sellers (Alibaba Fiscal Year 2020 Annual Report). Sellers on Alibaba may purchase the annual Gold Supplier membership, which was already launched in October 2000, to reach customers online, provide quotations, and transact on the marketplace (Anwar, 2017). As of March 31, 2020, Alibaba.com had around 190,000 paying members from China and other countries. In the fiscal year 2020, over 20 million buyers from approximately 190 countries had sourced business opportunities or completed transactions on Alibaba.com (Alibaba Fiscal Year 2020 Annual Report).

In addition, by using data-driven methods, like consumer analytics Alibaba identified **overseas Chinese** consumers as important buyers. Therefore, Tmall Taobao World, a Chinese-language e-commerce platform, offers overseas Chinese conveniently shopping products from China (Alibaba Fiscal Year 2020 Annual Report). By leveraging Alibaba's existing commerce infrastructure, Tmall Taobao World aims to serve tens of millions of overseas Chinese consumers.

Another target group of Alibaba are **Chinese tourists**. The number of Chinese tourists increased from around 45 million people in 2008 to almost 162 million tourists in 2018 (Textor, 2020). For these constantly growing groups and financially strong Chinese buyers, Alibaba provides with its payment system Alipay an outstanding service. Chinese tourists can pay in foreign countries very conveniently with their smartphone and do not even have to change any money. Worldwide, more than 80,000 retail stores accept Alipay whereof around 10,000 retailers are in Europe and around 2,000 retailers in Germany, e.g. Rossmann, WMF Group, Kaufhof, Breuninger and the Munich Airport (Scheuer, 2018). For the international expansion of Alipay, these Chinese tourists play a crucial role. Alipay is also the payment solution for Chinese tourists buying at UGG shops in Australia, King Power duty free shops in Thailand, Lotte malls in Korea, or Takeya stores in Japan.

Besides focusing on different strategic target groups with different platforms, one further key element for Alibaba's fast and successful internationalization are strategic partnerships and acquisitions.

**Strategic partnerships** include international joint ventures, for example with MegaFon, Mail.ru Group and RDIF in Russia, or with the Swiss company Richemont for luxury products, as well as international cooperations with local partners, such as with CCPay in Singapore, or with Yahoo! Japan (Havinga, Hoving & Swagemakers, 2016). The aim of these strategic alliances is to further advance Alibaba's global network, to facilitate and optimize cross-border transactions, as well as to enable merchants to sell globally and consumers to buy globally. Further examples are partnerships with Apple's iTunes Store that accepts mobile wallet payments from Alipay's local partners in Korea, the Philippines and Thailand with

Mars Incorporated, one of the largest food manufacturers, with Accor hotels, with Deloitte Consulting, as well as cooperations often with exclusive agreements, with Visa, MasterCard, with Antwerp World Diamond Center, with Moet Hennessy and with Ford Smart Mobility, to name just a few.

**Acquisitions** played another important role for Alibaba's rapid international expansion. On the one hand, Alibaba acquired many China-based companies, like Xiami Music Network in 2013, 365 Translation in 2015, South China Morning Post in 2016, or Intime Department Store in 2017. On the other hand, Alibaba acquired foreign companies as well, such as Tokopedia from Indonesia and BigBasket from India both in 2017 (Johnston, 2020). One acquisition that is seen as key strategic investment from Alibaba was the purchasing of Lazada from Indonesia in 2016. Lazada is a leading e-commerce platform in Southeast Asia for small and medium sized enterprises that offer regional and global brands. Lazada offers merchants and brands a one-stop marketplace as it has its own logistics network, which is the determining success factor in that region (Scheuer, 2018). Lazada gives Alibaba access to consumers in Indonesia, Malaysia, the Philippines, Singapore, Thailand, and Vietnam with an estimated user base of 200 million people. From 2019 to 2020, the number of transactions increased by 170%. In particular, Lazada saw a large demand in apparel, accessories and fast moving consumer goods categories, where Artificial Intelligence recommendations and an efficient search engine were key drivers for growth (Alibaba Fiscal Year 2020 Annual Report).

In order to support its international customers and provide adequate services, Alibaba had in 2020 117,600 **employees worldwide** and 13 office locations across 12 countries: China (Headquarters in Hangzhou), Hong Kong, Taiwan, USA, UK, Italy, France, Germany, The Netherlands, Japan, India, and Australia (Alibaba Group, 2020). In India, for example, Alibaba opened in 2010 its customer service operations, while the office in London opened in 2015 and serves as central hub for the European business (Anwar, 2017). Alibaba uses Alibaba.com and 1688.com in emerging countries to target there more than one billion potential customers. In developed countries, Alibaba is competing with Alibaba.com, 1688.com, Tmall.com and Tmall global for its 400-500 million customers.

To expand its presence in key markets and serve international customers, Alibaba proposed in 2017 to build a global e-commerce platform, World e-Trade Platform (**eWTP**). The long-term goal is to eliminate barriers to commerce in order to promote free trade and help businesses and consumers everywhere participate in cross-border trade (Wu & Gereffi, 2018). eWTP is a vision of Jack Ma with which he wants to revolutionize the world trade. Belgium was the first country in Europe to join eWTP in 2018, having in Liege the largest cargo airport of Belgium which should become a smart logistics hub. eWTP was presented by Jack Ma during the G20 summit in Alibaba's headquarters in Hangzhou and has set up partnerships and initiatives in China, Malaysia, Rwanda and Ethiopia (China Daily, 2019). Negotiations and plans with other countries' governments are running.

## **INTERNATIONAL DIGITAL MARKETING STRATEGIES**

### **Product Strategy**

Alibaba provides diverse **digital products** that facilitate convenient and fast management for merchants. Information can be uploaded and / or updated freely into the database in order to contact buyers directly. For instance, Alibaba.com shows company profiles, showrooms as well as contact information. Buyers can use the search engine for products and registered users can easily create trade alerts. Further provided

digital services for sellers are establishing blogs, forums and user groups for customers to communicate and gather feedback regarding their products and services of their interests. Other communication channels are Alitalk and Yahoo message that enable the dissemination of updated information of demand and supply in real time.

As described above, Alibaba offers a wide range of products that include e-commerce, logistics, payments, financial services, cloud solutions, data technology, entertainment, media, groceries, gaming, web services, on demand delivery and health services. This diversity of online platforms and marketplaces address different retail supply chain management and sales and marketing systems.

Another key success factor for Alibaba was its customer segmentation according to the geographical criteria. By utilizing data from Big Data analytics, Alibaba decided to divide its digital business and platforms into the **home market**, China on the one side, and **international markets** on the other side. Hence, some platforms and products are only available and adapted for the international market (Havinga, Hoving & Swagemakers, 2016). For example, Alibaba provides a special website for customers in Japan, called Alibaba.co.jp, which is different from Alibaba.com. Another example is Lazada, the e-commerce platform for customers in Singapore, Indonesia, Malaysia, the Philippines, Thailand, and Vietnam. Lazada provides local language options and mobile apps to customers in each of the six markets. It has developed its own logistics infrastructure with warehouses and a last-mile delivery fleet to offer fast and reliable services to its customers (Wu & Gereffi, 2018). Further, the platform Taobao has two different versions, one is for the Chinese market and the other one for the international market.

## **Pricing Strategy**

As to Alibaba's pricing strategy, in order to draw attention away from its higher priced competitors, Alibaba follows a very aggressive pricing policy. Alibaba enters new markets with extreme low prices and hence a **penetration pricing** strategy. For instance, when ebay entered the Chinese market to address Chinese private consumers, one of the decisive strategic factors that Alibaba helped in the end to succeed and win the competition against ebay with Taobao was the pricing. While ebay charges fees and commission, Taobao is completely free of charge (Scheuer, 2018). Likewise, AliExpress does not have any registration fee.

Moreover, Alibaba set itself right from the beginning the target to build up a big digital platform system at a very rapid pace. Accordingly, it offers for example the services on Alipay at very advantageous prices. At the beginning, those services were almost for free, and even though Alipay introduced service fees, they are still much lower than those of its international competitors. Numerous discounts and cash back opportunities for customers aim to win new customers and turn them after some purchases into loyal regular buyers.

In summary, to establish its presence, Alibaba offers lower prices than its competitors even if that results in an initial, albeit calculated income loss. However, the goal is to raise brand awareness, brand loyalty and to occupy important future markets. This is again an example for Jack Ma's strategic and long-term thinking mentioned above infused and supported by data extracted from consumer analytics.

In the course of time, Alibaba gained substantial competitive advantage from having built its business to a massive scale and following the **cost leadership** approach. Economies of scale enable Alibaba to generate enough revenues to sustain its expansion to various new markets as well as its capability to satisfy the market needs for different sectors. Alibaba provides merchants, retailers and small and medium sized enterprises with cost effective digital platforms to market and sell their products.

## **Distribution Strategy**

Alibaba is at its core a technology company with special focus on e-commerce. The **internet** is used by Alibaba as the main intermediary. The platforms and services are online, and therefore distributed through websites. Digital platforms are the main distribution channel for Alibaba's products and services. They are constantly adapted and improved due to insights gained from data analytics.

The simultaneous development of **countrywide logistics** networks helped strengthening the e-commerce of Alibaba crucially (Scheuer, 2018). In terms of logistics, Alibaba entered on the international level partnerships of strategic importance with post offices. For example, Alibaba has partnerships with Australia Post, Singapore Post, and U.S. Postal Service. With its Cainiao Network, Alibaba builds and operates a global fulfillment network together with network partners by offering domestic and international one-stop-shop logistics services and supply chain management solutions. To support its cross-border retail commerce businesses, which are mainly Lazada, AliExpress and Tmall Taobao World, Alibaba uses a combination of bonded warehouses in China and direct shipment from markets outside mainland China (Alibaba Fiscal Year 2020 Annual Report).

Besides the online distribution channels, Alibaba also has physical distribution stores and distribution channels. In 2017, Jack Ma publicly announced a strategy to combine online and offline commerce, called "**New Retail**" (Wang & Ng, 2020). Shopping experiences from physical brick-and-mortar space are merged with those shopping experiences of virtual e-commerce stores that are identified as most popular by consumer analytics. This omni-channel experiential retail is seen as the future of the retail industry. Alibaba wants to enhance physical stores that are indispensable during and for the customer journey, through data-driven technology and personalized services of the digital economy.

New Retail examples include thousands of **mom-and-pop stores** across China using Alibaba's retail management platform Ling Shou Tong which helps store owners optimize product procurement and boost sales by giving recommendations based on sales analytics on what to buy and how to display goods. Alibaba's cloud computing and logistics businesses create digitally connected inventory management systems where products are directly shipped from warehouses eliminating the need for middlemen and are provided for free for Chinese store owners as long as they use Alibaba's storefronts as fulfillment-and-delivery centers and hand over data on their customers' shopping habits (Hao, 2018).

Another example of Alibaba's New Retail initiatives are tech-enabled **Hema** grocery stores where customers can use a mobile app to get product information and recipe ideas personalized to their preferences based on consumer analytics. At the end, they can pay with their smartphones using Alipay. Hema stores are also distribution centers where assigned employees go around filling bags with online orders which are then placed on a conveyer belt to the delivery center (Li, 2019).

Moreover, Alibaba opened **Tao Cafe** which are cashier-less cafes using artificial intelligence and facial recognition-enabled cameras to allow customers to skip the checkout line. Tao Cafes are staff-less cafeterias selling drinks and snacks as well as backpacks, notebooks, plush toys and the like for Taobao customers paying with their app (Schögel & Lienhard, 2020).

Further, Alibaba set up **vending machines** to let customers buy sample-size consumer products which helps Alibaba to collect data on consumer preferences and follow up with customers online. Beyond groceries, fashion, and electronics, is the vending machine that Ford agreed to set up with Alibaba in China to sell and test-drive their cars. This cat-themed car vending machine is unstaffed, digital and works with the Tmall app. Users can select the car model they are interested in, leave a deposit electronically, schedule a pickup time, make a selfie for the necessary facial recognition and then have a test drive for

free. Prerequisite is a credit score of at least 700 which is scored at Ant Financial's credit ranking system Sesame Credit (Ong, 2018).

In international markets, Alibaba has also physical stores that aim to convince both international customers to use Alibaba's platforms as well as international enterprises to sell on Alibaba's online platforms. For example, **AliExpress PLAZA** opened in 2019, its first physical store outside China and in Europe in Madrid, Spain. The 740 sqm store in Madrid offers products of around sixty brands, including Chinese products, multinational brands as well as local Spanish brands (retaildetail.eu, 2019). Customers can purchase their products through their AliExpress account and enjoy the same benefits and promotions available online as well as cash or card payments.

Moreover, Taobao has opened a physical store in 2019 in Singapore selling home furniture goods. This **Taobao Store** is a partnership with the local company Virmall and sells products from merchants on Taobao. Similarly with above described New Retail initiative, customers can use mobile apps for product information, pick up their online orders, and payment services. Additionally, there is a complimentary virtual reality service for customers to better visualize how a piece of furniture will fit into their homes (Ng, 2019). Another Taobao Store can be found in Kuala Lumpur, Malaysia. Unlike its counterpart in Singapore, not only furniture goods but diverse items from electronics, to baby products are sold there by local and Chinese merchants. The aim is to further localize services and experiences to Malaysian customers, to show popular products and introduce new ones, as well as to win new online customers who are unfamiliar with online shopping experiences (Cheema, 2019).

## **Promotion Strategy**

Alibaba uses a number of different channels to promote its brand. It advertises through various channels, like **traditional** print media, radio, TV advertisements as well as trade fair booths with catchy taglines. Alibaba also utilizes the rather outdated TV shopping channels, but integrated the possibility that potential customers can ask live questions and let the presenters show the products benefits live as well. Hence, everything aims to increase direct interaction (Scheuer, 2018).

For promoting its **online** products and services, Alibaba uses in addition digital media. Thousands of video channels are online where young sellers present the latest trends and newest products. Another sales promoting tactic is the use of live streaming involving an influencer who demonstrates a product and responds to questions from the digital audience. This real-time format is a highly effective way to impact online purchasing. Further, in accordance with its low pricing penetration strategy, all Alibaba platforms offer diverse discount purchases, festive sales and cash back opportunities on a regular basis. Sometimes offline retailers are to join Alibaba's online promotion as well. For example, in 2015 more than 300,000 brick-and-mortar stores in China and around the world participated in the December 12 sale by offering discounts to consumers who use their mobile phones to make a wide range of so-called "on-demand" purchases, from fast food to movie tickets to taxi rides to car washes to haircuts to fresh fruit. This was to push the use of Alipay on the one hand, and on the other hand to get traditional retailers involved in omni-channel retailing (Wang, 2015).

Moreover, Alibaba is sponsoring international events, particularly in the sports sector. Alipay's sponsorship of UEFA in 2018 to 2026, Tmall's engagement in Renault F1 as well as Alibaba's sponsorship of the Olympic Games are examples of this promotion tactic. The target is to create brand awareness and improve brand perception.



## **DISCUSSION, LIMITATIONS AND FUTURE RESEARCH**

Data-driven methods and technologies helped Alibaba tremendously to capture abundant and meaningful data on their consumers. The process of extracting significant consumer insights from Big Data became a cornerstone for Alibaba's international marketing strategy. Particularly, consumer analytics were utilized to build market advantages by fueling Alibaba's international marketing decision-making, its agility, as well as its consumer-centric approach.

By extracting and detecting patterns from large databases, Alibaba could successfully forecast and steer customer behavior, for example as he did with massive digital marketing campaigns for 11.11.

A specific strength of Alibaba is that the valuable consumer insights benefits its process to enhance dynamic and adaptive capabilities. Alibaba is able to react to market changes in a very dynamic way. Additionally, Alibaba acts in a proactive way as well, for example in enlarging its distribution channels continuously by combining offline and online options. In doing so, Alibaba uses numerous opportunities to enhance its adaptive capability.

Both dynamic capability and adaptive capability achieved through consumer analytics enables Alibaba to constantly customize its marketing activities to local markets' demands and improve its effectiveness of digital marketing tactics.

As to internationalization, Alibaba uses data analytics to always better its understanding of local consumers' behavior and preferences. Jack Ma optimized the process of consumer analytics to gain a deep insight into international consumer behavior differences. This resulted in improved adaptations of the marketing mix to international consumer needs wherever needed on a constant basis. Thus, he is able to exploit benefits from data analytics to a great extent.

Alibaba shows a high level of marketing adaptability by adapting different aspects of its digital marketing strategy to different international target markets. The capability to improve its offerings by rethinking and redesigning its products to better match the diverse demands of different international markets is deeply incorporated in Alibaba's digital marketing strategy.

Marketing data mining techniques and consumer analytics helped Alibaba to accomplish such goals as adapting its products to international markets as compared to its home market China. For instance, the platform Taobao has two different versions, one is for the Chinese market and the other one adapted for the international market.

Alibaba also conducted international marketing analysis on promotional data, such as price cuts or coupons. Alibaba could find out how different types of customers (national, international, overseas Chinese) responded to different promotional strategies or how different categories of products affected the effectiveness of promotional strategies. Enhanced by mobile technologies and location-based services, Alibaba could also use customers' location information to improve its promotion strategy and select targeted customers.

To improve product awareness and promote products to potential international customers, Alibaba developed and supported recommender systems as well. User rating-based collaborative filtering methods and content-based association mining methods enabled Alibaba to reach different international customers through different versions adapted to their preferences.

This paper also clarifies how data data-driven methods can lead to opportunities for networked businesses to gain a competitive advantage. It explains how they are leveraging themselves by utilizing contemporary marketing strategies and tactics that are customer-focused.

Alibaba's comprehensive ecosystem infused by Big Data and consumer analytics has been a tremendous driver and accelerator for its international digital marketing and international success.

## **CONCLUSION**

Alibaba has become within a relatively short period of time, one of the world's largest retailer and e-commerce companies and one of the most successful Internet companies worldwide. It successfully owns and runs a multifaceted portfolio of companies around the world in diverse business sectors. Alibaba hosts the world's largest digital marketplaces, is rated as one of the largest artificial intelligence companies worldwide, is also one of the biggest venture capital firms and investment corporations in the world, and claims to be the biggest IT corporation of China (McLaughlin, 2018; Patrizio & Maguire, 2018).

By referring to the aspects mentioned above, the five main decisive key success factors for this impressive development can be summarized as follows.

First, by building its own huge digital ecosystem which is constantly improved due to insights gained from data analytics, Alibaba was and is able to act independently. With every new digital product or service, Alibaba adds another important building block for its national and international success. By related and unrelated, horizontal and lateral diversification, Alibaba continues to grow and to ensure that the single parts of the ecosystem are mutually beneficial which in turn provides possibilities for further growth.

Second, by separating the offers of digital products and services into the home market China on the one hand and international markets on the other hand, Alibaba is able to focus on the respective customer segments effectively. This strategic decision was made due to insights gained from consumer analytics. By tailoring its digital products and services, Alibaba is able to respond to a country's specific demands and hence reach consumers. This differing segmented marketing approach proved to be very successful.

Third, a thorough understanding of Chinese customer needs and consequent adaptation of offers based on consumer analytics and Big Data helped Alibaba enormously in outpacing its Western competitors. This aspect may also contribute to the standardization versus adaptation paradigm discussion. So far, the perspective of the standardization versus adaptation paradigm has been when a company enters another country and how this company is to conduct marketing in this host country. Now, we may also observe and learn from a company's international entry and see how host countries' companies can react accordingly, meaning to standardize or adapt their own marketing efforts.

Fourth, the long-term and strategic big thinking of founder Jack Ma is another key success factor. His strategic approaches were leading to a very early international expansion and digital marketing practices, tactics and strategies that used the knowledge acquired through these international activities.

Lastly, the integration and merging of online and offline products and services can be seen as crucial success factor as well. By building a solid online foundation first in China, the fast expansion into other countries and business sectors could follow. The interconnection and the combination of online with offline goods and services demonstrates Alibaba's innovativeness and pioneering spirit. The fast use of new learnings and knowledge proved to be very beneficial for Alibaba so far, and new technology innovations are expected to continue to bring out new products in the future as well.

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## **Alibaba's International Digital Marketing Practices and Strategies**

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## KEY TERMS AND DEFINITIONS

**Business-to-Business (B2B):** A business relation where one company makes a commercial transaction with another.

**Business-to-Consumer (B2C):** A situation where a company is selling products or services directly to consumers.

**Consumer-to-Consumer (C2C):** A situation where a consumer is selling products directly to another consumer.

**Digital Ecosystem:** A group of interconnected information technology resources that can function as one unit.

**E-Commerce:** The activity of electronically selling or buying products or services over the Internet.

**International Expansion:** Corporate expansion into other countries including trade and transactions of goods and services.


**International Marketing:** A marketing done on the international level, based on a strategy created in the home country of the company and distributed to other affiliations.

**Standardization vs. Adaptation:** Crucial part of the international marketing strategy, decision whether to sell products and services overseas in a standardized or adapted way.


## Chapter 6

# Activism in the Digital Age: Social Movements Analysis Using User- Generated Content in Social Media

**Laura Holgado-Ruiz**

 <https://orcid.org/0000-0003-0217-7574>  
*Rey Juan Carlos University, Spain*

**José Ramón Saura**

 <https://orcid.org/0000-0002-9457-7745>  
*Rey Juan Carlos University, Spain*

**Beatriz Rodríguez Herráez**

*Rey Juan Carlos University, Spain*

### ABSTRACT

*Social movements have been transformed in the last decade by social networks, where the dynamics of the social protests have evolved and have been structured and viralized through social media. They are no longer just conversations between activists that stay on social platforms. The cyberactivism that takes place on Twitter or Instagram can also play a significant role in general society by influencing government decision making or shaping the relationships between citizens. In this chapter, the authors explore the main activist movements that took place in social media in the last decade: Occupy, BlackLivesMatter, and MeToo. The proposed approach used in this study facilitates the comparison of each movement while focusing on the user-generated content in social media. This study suggests the presence of four major categories to frame the content generated by the activists. The chapter concludes with the identification of three different approaches to the research of a future research agenda that should be considered for the study of the social movements from the UGC theory framework.*

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## INTRODUCTION

Social movements represent the collective effort of people to voice their concerns over the civil, economic and political welfare of a population of people (Snow et al., 2004). Although social movements in 20th century history have been marked by individuals such as Emmeline Pankhurst to Martin Luther King to Mahatma Gandhi promoting change in the awareness of people (Montefiore, 2014), the modern social movements in the 21st century have evolved with the advancement of technology and social media and have been marked by the often anonymous collective power (Velasquez & LaRose, 2015).

As George and Leidner (2019) study, from street demonstrations and marches, movements marked by technology have evolved, achieving a greater reach and being carried out in many different ways such as clicktivism, digital petitions or data activism. These social movements promoted or executed through the Internet are also called digital activism. Although, as Joyce (2010) points out, there are numerous terminologies such as cyberactivism, e-activism or online advocacy that are also used to refer to all forms of social or political campaigns using digital infrastructures.

Social movements have been transformed in the last decade also due to social networks, where the dynamics of social protests have evolved and have been structured and viralized through the channels offered by social networks (Tan et al., 2013). It is no longer exclusively about conversations between activists that emerge and are maintained on social platforms. Nowadays, cyberactivism taking place on Twitter or Instagram can also play a crucial role in society at large, by influencing government decision-making or shaping relationships between citizens, brands and other stakeholders (Sandoval-Almazan & Gil-Garcia, 2013).

Social networks facilitate leveraging and maximizing the collective power of all like-minded individuals by disseminating information quickly and expansively (Hwang & Kim, 2015). Social networks are considered to provide an effective method not only for disseminating information but also for involving new volunteers in social movements (González-Bailón et al., 2011), hence they can be considered one of the main current platforms for exercising activism.

Following Yang (2016), one of the most interesting developments in digital activism in recent years is the rise of “hashtag activism” (HA). HA occurs when users create a large number of posts on social networks under a common word or phrase, with a hashtag that acts as a social or political rallying cry. This “networked power of hashtags,” together with the power of collective storytelling, can turn the sharing of a personal experience online into an action that makes a collective movement more powerful (Clark, 2016).

Despite the social importance of this digital activism, research defining the trends, comparisons, and relationships between different activist movements in social media remains limited. Understanding modern activism requires determining the patterns and commonalities across social movements and their use of these digital channels like Twitter and Instagram for driving social movements, demonstrations and protests. Furthermore, in the same way that research on user-generated content (UGC) applied to brands has great potential value for communications, advertising or customer engagement (Liu et al., 2017), the relationship between UGC and HA has not yet been widely investigated in academia covering a gap in the literature. Therefore, the originality of the present study lies in the relevance of our object of study, as it compares and contrasts hashtag movements by exploring patterns in the use of hashtags during periods of three distinct social justice movements: Occupy, MeToo and Black Lives Matter. Specifically, we analyze UGC from the beginning of each movement to assess homogeneous features in the generation and sharing of Twitter content during different social movements.

Likewise, a user-generated data (UGD) research provides a broad view of each social movement as it contains rich information about users' attitudes, opinions, and experiences (Liu et al., 2019; Ribeiro-Navarrete et al., 2021). Along these lines, this study highlights the usefulness of UGC to provide insights and a better understanding of the complexity of major social movements, for social justice and politics, in the digital sphere. Accordingly, this study proposes the following research question (RQ): what homogeneous features are found in the purpose pursued by participants of different social movements when generating and sharing content on Twitter?

The chapter is structured as follows. First, it reviews previous studies published on social movements in social networks and user-generated content on digital platforms. Specifically, it highlights research that focuses on the analysis of the discourse of cyberactivist movements in social networks. Next, the methodology carried out is presented and the results obtained through a multiple case study are reported. Subsequently, a discussion is presented as well as a detailed agenda for future research. Finally, the conclusions of the study are offered.

## **THEORETICAL FRAMEWORK**

### **Social Movements in Social Media in the 2010s**

The decade of 2010 began with one of the main social revolutions brought about by social networks, the Arab Spring (Howard et al., 2015). In this movement, social networks played a key role in changing the media agenda and fostering an unprecedented political debate. Thanks to platforms such as Facebook, Twitter or YouTube, democratic ideas not only played an integral role in the defeat of the Egyptian and Tunisian governments, but also crossed international borders, generating hundreds of thousands of messages calling for democracy in North Africa and the Middle East (Bruns et al., 2013; Howard et al., 2015; Wolfsfeld et al., 2013).

Ten years later, in 2020, the dynamics of social protests continue with the same essence. Conversations in social networks go beyond dialoguing and sharing resources, they also serve to explicitly propose actions, such as voting for or against someone or trying to change a policy (Li et al., 2020). For example, this very year and along these lines, the #BlackLivesMatter movement has re-emerged, which can already be considered a technological as well as a cultural phenomenon (Jackson, 2016).

Following Paul (2019), the largest social movements of the 2010s have been: criminal-justice reform, occupy, LGBTQ+ rights, marijuana decriminalization, gun control, Black Lives Matter, native american rights, new populism, #MeToo and climate strike. In this study, we have selected as a case study those that have quickly transcended the borders of North America to become a worldwide movement sustained over time (Amesu, 2021; Arriaza-Ibarra, 2019; Theocharis et al., 2015), and which in turn are focused on a goal related to political and social justice. In this case: Occupy, Black Lives Matter and #MeToo (See Table 1).

The Occupy movement was influenced as much by the Arab Spring as by the "indignados" movement in Spain or the "aganaktismenoi" movement in Greece, all of them identified with the idea of demanding "real democracy" through social mobilization (Theocharis et al., 2015). As Van Gelder (2011) studies, the protests were organized around the idea that the protesters were the 99% of society, placing themselves in confrontation with the remaining 1% that agglutinates wealth and generates systematic inequality. The strength of this movement lay in the activists' use of social networks. As Gamson and Sifry (2013)

analyze, without user-generated and non-corporate owned media, it is quite possible that the Occupy movement would not have achieved its level of notoriety.

In the case of Black Lives Matter, it is a movement that has made clear the importance of networks as platforms to discuss police violence and systemic racism (Carney, 2016). Following data from Pew Research Center, this movement, which emerged in 2013, has had different moments of great agitation in networks. For example, with the Ferguson protests after the death of Michael Brown, in 2014, or the attack on police officers in Dallas, in 2016, but it has undoubtedly been in 2020 when this movement has overwhelmed the networks at the international level (Anderson et al., 2020). After #COVID19, the second most tweeted hashtag of 2020 was #BlackLivesMatter. The world mobilized and echoed the need for racial equality and social justice following the death of George Floyd, who was the third most tweeted person globally (McGraw, 2020).

Regarding the #MeToo movement, as indicated by Mendes and colleagues (2018), it was started by Tarana Burke in 2006, an African-American women’s rights activist. It would not be until a year later when it reached worldwide attention following a tweet by actress Alyssa Milano. The hashtag quickly became a way for users to unite and recount experiences of sexual violence suffered by women, while standing in solidarity with survivors of sexist attacks. Research such as Modrek and Chakalov’s study (2019) indicates that more than 5% of tweets in that period of time unveiled experiences of sexual abuse.

#MeToo was widely used on Twitter, Facebook, Snapchat and other platforms. According to CBS (2017), Facebook alone garnered more than 12 million comments and reactions during the first 24 hours. Meanwhile, the official Twitter Data (2017) account confirmed 3 million tweets with the hashtag during the first week of the movement. Table 1 shows the most prominent social movements of the 2010s related to social justice found in the literature.

*Table 1. Most prominent social movements of the 2010s related to social justice.*

<b>Social Movement</b>	<b>Representative hashtag</b>	<b>Year of creation</b>	<b>Main message</b>	<b>Relevant authors</b>
Occupy	#OccupyWallStreet	September, 2011	Wealth equality	Calhoun, 2013; Theocharis et al., 2015; Tremayne, 2014; van Gelder, 2011.
Black Lives Matter	#BlackLivesMatter	July, 2013	Racial equality	Carney, 2016; Ince et al., 2017; Rickford, 2016.
#MeToo	#MeToo	October, 2017	Reporting sexual assault and harassment	Mendes et al., 2018; Rodino-Colocino, 2018.

As indicated by Hwang and Kim (2015), social movements find in networks an efficient and effective platform for their development. There are two main reasons for this. On the one hand, social network users can contribute to the globalization of social movements by transmitting their messages to a wider audience, so that communication spreads over larger and larger territories (Wright, 2004). Secondly, social networks empower users to share messages that seek social activation, achieving public engagement in a horizontal and democratic manner (Hwang & Kim, 2015).

A common issue of many of the large social movements in the 2010s is the connection through a hashtag as a key to their identification and identity. Often referred to as “Hashtag Activism” (HA). Hashtags allow Twitter users, and those visiting the Twitter website without being registered, to follow

in real time all messages containing the hashtag (Bruns & Stieglitz, 2013). This idea has evolved into a tool for those who want to comment on social and political change (Chen et al., 2018). Although hashtags initially emerged in the social network Twitter, we can currently see it in many others, such as Instagram or Facebook, generating the same empowering effect of activist messages.

HA has not been without its critics (Meikle, 2014). While there are those who support the usefulness of this connection between users united by a cause (Jackson et al., 2020), certain concerns can be found about the possibility that this form of digital activism can replace real actions that require greater commitment (van Laer & van Aelst, 2010)

**User-Generated Content**

As its name suggests, UGC is all that material that comes from standard users who voluntarily create and publish different data, information and content, which is subsequently published and may be of interest to others (Krumm et al., 2008). It is considered one of the main data sciences used in digital marketing strategies, and it can be used to analyze the content publicly published by users on social networks and all kinds of digital platforms (Saura, 2021).

Following Luca (2015), UGC platforms allow their users to interact with each other by generating content and being able to share it publicly and interact with it. Depending on the platform, different modalities of content are generated, considering not only text, photos and videos, but also content from crowdfunding platforms or sharing platforms (*See Table 2*).

*Table 2. Popular user-generated content platforms*

Types of UGC	Prominent platforms
Pictures	Instagram, Pinterest, Snapchat, Flickr
Personal updates and networking	Twitter, Facebook, LinkedIn, Qzone, Sina Weibo
Reviews for products and services Encyclopedia and reference sites	Google my Business, Amazon, TripAdvisor, Yelp
Videos	Wikipedia, Wikia
Comments on news articles	YouTube, TikTok/Douyin, Kuaishou
Crowdfunding	NY Times Online, WSJ Online
Sharing platforms	Kickstarter, IndieGoGo, GoFundMe
Social payments	Uber, Airbnb, Couchsurfing
Discussion/question and answer	Venmo, Cash app, Paypal
Blogs	Reddit, Quora, Baidu Tieba
	WordPress, Tumblr, Medium, Blogger

UGC in social networks can have themes of diverse nature, from content related to self-presentation and self-promotion (Fox et al., 2018), consumption and branding (Christodoulides et al., 2012; A. J. Kim & Johnson, 2016), related to personal experiences, health-related (Fergie et al., 2016), travel-related experiences (Chung et al., 2015; Reyes-Menendez et al., 2019) or political opinions (Bennett & Segerberg, 2012; Peña-López et al., 2014), among others.

Studies as Naab and Sehl (2017) show how the UGC has a clear predisposition for political topics and the users preference is to focus on messages with a societal orientation. As social media has provided users the opportunity to make public their private political opinions, the combination of UGC and Activism has a considerable research potential but also it can be a methodological challenge. However, although UGC

provides an excellent opportunity to include historical and real-time data on a broad variety of topics, its semi-structured or unstructured nature makes information extraction difficult (Meneghello et al., 2020). Users don't necessarily consider keywords or names that are search engine friendly. As a result, the lack of guidelines or criteria surrounding UGC makes data collection for research purposes more difficult. For this reason, the analysis of content generated by activists on social media is often analyzed by using their popular hashtags, as they serve as an indexing system (Bonilla & Rosa, 2015; Xiong et al., 2019).

## **User-Generated Content Analysis Applied to Hashtag Activism**

Since the beginning of the use of hashtags in a wide variety of social movements, several studies have been conducted investigating the content of Hashtag Activism (HA) movements through different methods (Kim et al., 2020).

One of the typologies of studies focuses on hashtag ethnography, conducting an ethnographic description of the possibilities and needs of this modality of activism (Bonilla & Rosa, 2015). There is also research that focuses its study on the analysis of images, through networks such as Instagram or Twitter (Kim et al., 2020; Stefanone et al., 2015).

Another group of studies of HA focuses on analyzing the textual content published and created by users of social networks. This field of analysis can be quite broad as different areas and platforms where users can post text can be analyzed. Such as, for example, comments in Facebook groups (Woolley et al., 2010), posts on Weibo (Shi & Chen, 2014) or tweet analysis (Gleason, 2013)

Regarding the analysis of UGC in social networks, different studies have been carried out that have applied different techniques to analyze content in various social movements united by a hashtag as shown in Table 3.

## **METHODOLOGY**

### **Case Study**

The case study is one of the most appropriate study strategies for the purpose of this research, as it studies a contemporary phenomenon in depth and within its real-world context (Yin, 2014). Context is fundamental information when talking about social movements as the political situation can often create the opportunity for their formation or strengthening (McAdam & Tarrow, 2018).

Snow and Trom (2002) have analyzed the case study methodology applied specifically to social movements. They indicate that the research objective of a case study is to understand and shed light on how certain initiatives, processes or events have been generated within a particular context, as well as to examine how they are reproduced and how interactions are generated with other elements that are related to the movement.

Following Yin's (2011) extensive study of case study research, the author classifies the types of case studies as explanatory, exploratory or descriptive. Likewise, depending on the selection of cases, it can be considered single or multiple-case studies, and depending on the depth of the study, it can be holistic or embedded case study (*See Table 4*).

*Table 3. Studies focused on UGC analysis applied to HA*

<b>Title</b>	<b>Authors</b>	<b>Hashtag Analysed</b>	<b>Description</b>	<b>Methodology</b>
Exploring key indicators of social identity in the #MeToo era: Using discourse analysis in UGC	Reyes-Menendez et al., 2020	#MeToo	This study determines the key indicators of social identity in the #MeToo movement in Twitter using textual analysis and sentiment analysis of UGC.	Using the methodological approaches of corpus linguistics and discourse analysis to study a corpus of 31.305 tweets.
"# IAmGay # What About You?": Storytelling, Discursive Politics, and the Affective Dimension of Social Media Activism against Censorship in China.	Liao, 2018	#IAmGay	This study investigates the #IAmGay online protest on Weibo against the platform's proposed ban on homosexual content.	Performing a textual analysis of 798 posts generated by users on Weibo and code them into six different categories.
Sexual victimization among men: a qualitative analysis of the twitter hashtag #UsToo.	Bogen et al., 2020	#UsToo	This study sought to characterize the use of the hashtag #UsToo on Twitter to disclose or comment on men's experiences of sexual victimization.	Performing a thematic content analysis on 281 tweets and categorizing them as the disclosure of victimization or response to the hashtag.
Tweeting in Support of LGBT? A Deep Learning Approach.	Khatua et al., 2019	#377Scrapped #Section377 #377verdict #IndiaRejects377	This article explores LGBT- related Twitter UGC to understand the societal acceptance of sexual minorities in the Indian context.	Extracting 0.58 million tweets and classifying them into supporting tweets or opposing tweets.
Language as pride, love, and hate: Archiving emotions through multilingual Instagram hashtags.	Lee & Chau, 2018	#雨傘運動 (Chinese word for 'Umbrella Movement')	This paper examines multilingual hashtags as discourse of emotions about social movements, with a focus on the 2014 Umbrella Movement in Hong Kong.	Collecting 9000 hashtags from 700 posts on Instagram. These hashtags were coded by language choice and their broad discourse functions of fact, opinion, and emotion.

In this research, a qualitative and exploratory methodology is used, where the main objective is to expand the information of the problem under study, without a clear and concrete single set of outcomes (Thomas, 2020; Yin, 2014).

A multiple case study is conducted since, unlike the single case study, it makes it possible to explore differences and similarities between the selected cases (Baxter & Jack, 2008; Yin, 2014). The objectives of multiple case studies, as Yin (2014) indicates, can be either predict similar results (a literal replication) or predict contrasting results but for predictable reasons (a theoretical replication). For this reason, cases have been carefully chosen, both in terms of scope and relevance as well as subject matter, to support the prediction of contrasting results.

In this study, three cases are analyzed along with their actual contexts (major political and social justice movements in the 2010s), and an embedded unit of analysis of each (in this case, user-created

content on twitter). Unlike the holistic model, the identification of a subunit of analysis allows for a rather more concrete and detailed level of investigation (Gustafsson, 2017).

Figure 1 shows the research model used, where the dashed lines show that there is no clear differentiation between the different layers, as the context of each case can permeate to each unit of analysis.

Table 4. Case studies types.

Case study type	Definition
Explanatory	A study used to resolve research questions with presumed causal linkage but considered too complex to resolve through experimental strategies.
Exploratory	A study used to explore situations where there is no detailed preliminary research, so there is no concrete hypothesis to be tested through the study.
Descriptive	A study used to describe a phenomenon within the real context in which it takes place.
Single	A study that analyzes a single case, either to test a theory or to analyze an extreme or exceptional case.
Multiple	A study that analyzes two or more cases and explores the differences between cases.
Holistic	A study that analyzes a single unit of analysis comprehensively.
Embedded	A study that analyzes one or more subunits within each selected case.

Source: Baxter et al., 2008; Gustafsson, 2017; Robert E. Stake, 2013; Yin, 2011, 2014

## Content Analysis

Following the content analysis method applied by Gleason (2013), who carries out a case study of a social movement through two samples of 144 and 150 tweets, in the present study 3 samples of 200 tweets containing the main hashtag of the movement in question were collected (*See Table 5 for details*). Thus, through a content analysis (Schwartz & Ungar, 2015), an exploratory coding of the sample collected from Twitter has been carried out. This is a standard procedure in studies that work samples collected from social networks and that use UGC as the foundation for the study (Saura et al., 2021).

As indicated by Reyes-Menendez, Saura and Alvarez-Alonso (2018), the social network Twitter is optimal for conducting a content analysis. From a privacy point of view, and unlike others such as Facebook, Twitter offers users an open communication that can maximize the reach of their opinions. Easy access to published information makes Twitter a valid platform for measuring public opinion.

The samples have been collected through Twitter’s advanced search tool. In all cases, the English language and specific time frames have been established. In the case of the Occupy and MeToo movements, the samples were collected two months after the beginning of the movement and the use of the hashtag on Twitter. This prevents messages from being conditioned by specific events, such as, for example, the first gathering of the Occupy Wall Street movement.

In the case of BlackLivesMatter, the sample is collected two months after the Ferguson mobilizations that took place from August to December 2014, as it is considered the first moment with great impact of the hashtag, regardless of whether it was created a year earlier (Anderson et al., 2020). The sample selection excludes all those tweets that merely share the hashtag, without expanding the content with text or images.

*Figure 1. Multiple-case study research design with an embedded unit of analysis  
Adapted from Yin (2011)*



Subsequently, following the study method carried out by Gleason (2013) and initially conducted by Kohlbacher (2006), systematic analysis of the selected UGC based on different categories has been performed. It includes a systematic analysis based on the creation of categories of text that are initially founded and then revised. First, for data coding, an inductive model of category development has been initially carried out after reading 50% of the tweets. Four categories were created on the basis of the emergent textual meanings of the tweets.

*Table 5. Embedded units of analysis selected for the study*

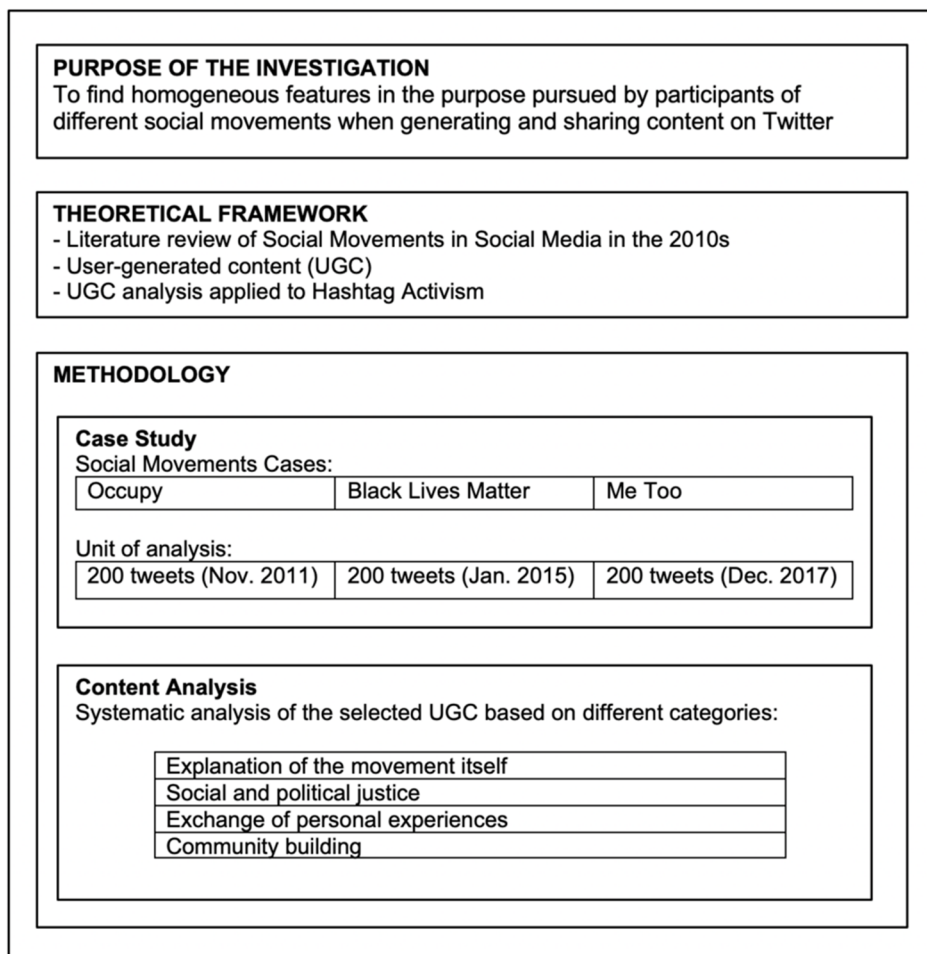
<b>Movement</b>	<b>Hashtag</b>	<b>Sample</b>	<b>Language</b>	<b>Date</b>
Occupy Wall Street	#OccupyWallStreet	200 tweets	English	15th November 2011
Black Lives Matter	#BlackLivesMatter	200 tweets	English	15th - 16th January 2015
Me Too	#MeToo	200 tweets	English	15th December 2017



Table 6. Key properties of each family grouping

Category	Main textual properties
Explanation of the movement itself	Informative messages without loaded language (emotive language, high-interference language) language-persuasive techniques).
Social and political justice	Messages with loaded language. Main focus on claims and petitions.
Exchange of personal experiences	Messages with loaded language. Main focus on disclosure of personal information or personal opinions. First person singular.
Community building	Messages with loaded language. Main focus on communicating as part of a group while offering support or specific help. First person plural.
Other	Messages unable to be categorized in the major categories above.

Figure 2. Summary of the methods developed



Then, after finding and reviewing four major categories, we classified in Table 6 the entire sample of tweets based on the textual properties of each one of them.

In order to summarize the methodological process carried out, Figure 2 presents a summary of the methods developed as well as their characteristics.

## RESULTS

The result of the present study has made it possible to compare the UGC of the different selected movements, as well as to explore the main thematic areas regarding the objective pursued by each user's publication, aligned with the research results regarding twitter content classification by Dann (2010) or by Gleason (2013). Thus, the exploratory analysis carried out suggests the existence of four cross-cutting areas that are present in the three cases studied. (See Table 7 for the examples of representative tweets of each area)

Firstly, the (i) explanation of the movement itself. This category focuses on informative communication, and here have been classified all those messages related to information about the movement, presentations of events that have taken place, real-time messages about rallies, media comments, updates with links to informative pages or videos.

Secondly, claims for (ii) social and political justice. This category classifies all messages related to specific claims and petitions in relation to the given movement. On many occasions, citations to politicians or personalities with greater visibility and power for change are used.

Thirdly, (iii) exchange of personal experiences. This category includes all those singular first-person messages that either convey how an activist within the movement is doing or reveal a significant event that the user has experienced. For example, disclosure of a past sexual assault, in the case of the MeToo movement, or of an experience of racist discrimination, in the case of BlackLivesMatter.

Finally, (iv) community building. This category brings together different messages that foster community building and are often expressed in plural first-person. The contents selected are intended to share resources, offer specific help, or provide general support messages to other activists.

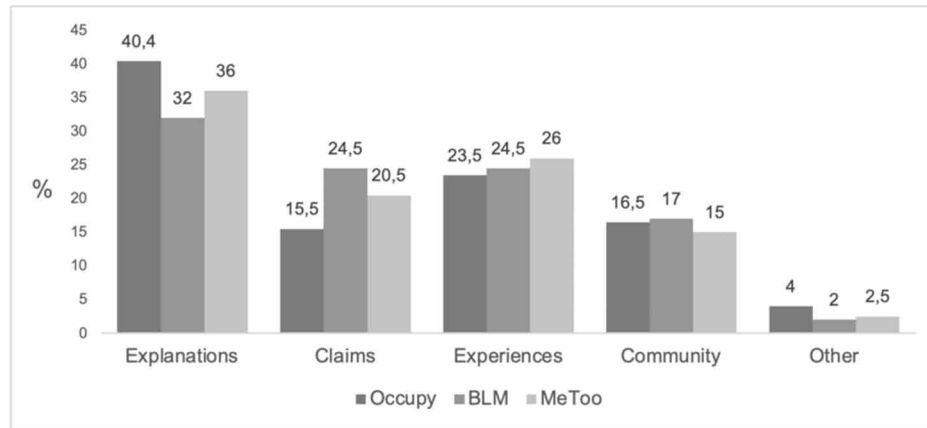
Table 7 below shows examples of tweets representative of each area and presents how the thematic classification of the analyzed sample has been carried out.

Once data samples had been coded and quantitatively analyzed, homogeneous features were found between the movements. The results showed very similar percentages of tweets in each category. On average, 36.1% of the messages were classified within "explanation within the movement", while 20.1% are "claims of social and political justice", 24% are "exchange of personal experiences", 16.1% are "community-building messages". There are 2.8% of tweets that were not likely to be classified in the previous categories. Figure 3 shows the data deduced from the analysis of the 3 movements.

Table 7. Representative tweets

Purpose	Movement	Representative Tweet
Explanation of the movement	OccupyWallStreet	@Acampadaparis Camp destroyed tonight by police is being rebuild #OccupyDefense #ows #occupywallstreet
	BlackLivesMatter	@ancklein Powerful statements from the organizers of the #Boston #BlackLivesMatter demonstration on I-93 today: <a href="http://bostonglobe.com/metro/2015/01/15/demonstrators-issue-statement/EE1fqG7tk3NooOHCu5dhOM/story.html">http://bostonglobe.com/metro/2015/01/15/demonstrators-issue-statement/EE1fqG7tk3NooOHCu5dhOM/story.html</a>
	MeToo	@AJEnglish #MeToo was founded by an African American woman, whose aim was to reach women in underprivileged communities. <a href="https://aje.io/veh2s">https://aje.io/veh2s</a> - #AJOpinion
Claims for social and political justice	OccupyWallStreet	@haywoodwhy Tell the Dept of Justice to protect the rights of #OccupyWallStreet protesters. Sign here: <a href="http://bit.ly/uBjh2v#OWS">#p2</a> @DFAaction
	BlackLivesMatter	@NYjusticeleague We march 4 the #StolenDreams of #TamirRice no more execution of our children by police! #BlackLivesMatter #ReclaimMLK
	MeToo	@CobaltDaisy There is a sexual harassment/abuse scandal in the oval office no one is paying attention to... why not deal with that one while they "nervously wait" for the next one on the hill? #MeToo
Exchange of personal experiences	OccupyWallStreet	@janelynne #occupywallstreet #occupyphiladelphia I am wary of so- called anarchists who are planted to discredit Occupy. They are undermining
	BlackLivesMatter	@kinkyintellect black women are not a group who people recognize as being victims of rape. we're never damsels in distress. #BLMconf #BlackLivesMatter
	MeToo	@TheWomensWatch Dear #CarterPage, As a #MeToo survivor I assure you that nothing you have endured over the last year is nothing, NOTHING, compared to the constant mental anguish a survivor goes through on a day to day basis. No one cares about your poor me act.
Community building	OccupyWallStreet	@brentnhunter It's irresponsible to be pessimistic in field of infinite possibilities. Let's build bridge to future. #occupywallstreet
	BlackLivesMatter	@iAskMonica "Alone we can do so little; together we can do so much." Helen Keller #FERGUSON #blacklivesmatter
	MeToo	@RepresentPledge We believe you and stand with you @realdylanfarrow. #metoo

*Figure 3. Percentage of tweets in each thematic area*



## **DISCUSSION AND RESEARCH AGENDA**

This study shows a number of common characteristics regarding what objectives social movement participants pursue when generating and sharing Twitter content. Like other social networks, Twitter offers multiple opportunities for engagement in social movements, either by creating content, citing, sharing links to text or video content, following a hashtag, etc. (Gleason, 2013). This, in turn, also offers many possibilities for academic research, as it allows to analyze both users and the various content that can be generated and shared.

Scholars have previously studied the users' purposes while interacting on social networks (Karahanna et al., 2015). Specifically, regarding activism and social movements, the use of social media has been evidenced, highlighting the aims of mobilization, persuasion, information exchange and distribution of resources (Miller, 2017; Pang & Goh, 2016). The present study agrees with those previous results found by Pang and Goh (2016) but broadens those conclusions by specifying the field of analysis thanks to developing a textual and comparative study.

As indicated by González-Bailón (2013), digital technologies are generating an unprecedented level of information. This fact might have great implications for the social sciences at a theoretical level, but also at a practical level, in fields such as policy making. In this regard, the significance of social movements under investigation is that it creates a great deal of attention on digital platforms as a large number of people see, share and interact with it. The information that results from these interactions, may be relevant for businesses, institutions, governments, decision-makers or public figures who want to engage with the numerous digital activists, as suggested by Shah, Sivitanides and Mehta (2013).

These findings are highly relevant to understand the patterns of how communication works between social movement activists, so they offer plenty of opportunities to create and share content aligned with the movement. As proposed by Reyes-Menendez, Saura and Filipe (2020), the mentioned stakeholders can use the insights of this research to successfully join the social media conversations and to better frame their communication and advertising through defining relevant messages and strengthening the companies' marketing, advertising, and reputational strategies.

While these results can be valuable to better acknowledge the main areas of communications behind the conversations held in past movements, they also are of great worth to theorize about how future movements would structure their messages on social media, as previously highlighted by Harlow (2020). In this way, all communications managers could take into consideration our findings in order to better plan their communications and marketing strategies when it comes to joining the social media conversation and position themselves within actual or future activist movements.

Furthermore, the findings of this research, by identifying homogeneous traits among different movements, are valuable for researchers as they offer the opportunity to develop new research areas related to the combination and comparison of social movements, aiming to achieve a more holistic view. In this way, in order to establish future research in this field of research, Table 8 presents future research areas and research questions.

Table 8. Future research areas

Approach	Future research areas	Future research questions
Comparative analysis between movements	<ul style="list-style-type: none"> <li>● Activist Engagement</li> <li>● Discourse analysis</li> <li>● Public opinion</li> </ul>	<ul style="list-style-type: none"> <li>● How have some social movements allowed and enabled the rise of others?</li> <li>● What is the activist archetype present in the social networking social movements? Are they replicated throughout the different movements?</li> <li>● Which movements have received the most public support on social networks?</li> </ul>
Analysis of the evolution over time	<ul style="list-style-type: none"> <li>● Activist Engagement</li> <li>● Discourse analysis</li> </ul>	<ul style="list-style-type: none"> <li>● Has the ‘filter bubble’ had an impact on activist engagement on social media?</li> <li>● Is there an evolution of topics and expressed sentiments in the UGC over time?</li> <li>● How does the gender of activists shape social network discourse?</li> </ul>
Analysis of changes resulting from the movement	<ul style="list-style-type: none"> <li>● Public agenda and policy reforms</li> <li>● Media</li> <li>● Companies</li> </ul>	<ul style="list-style-type: none"> <li>● Have any policy initiatives related to the claims of social movements been carried out?</li> <li>● How has the media presence and visibility of social movements evolved?</li> <li>● Is there any dissonance between UGC and news published in traditional media regarding a social movement?</li> <li>● Has the visibility of specific topics (in relation to minorities, feminism, etc.) increased in posts created by brands on social networks?</li> <li>● What impact does the involvement of brands in activist movements have on users’ perception?</li> </ul>

### Research Propositions to Address the Challenges and Opportunities of Social Media Analysis using UGC in Social Media

Aiming to guide future research in the area, we formulate different research proposals based on our study, which blends both the combined study of different social movements and their analysis from the perspective of UGC in social networks.

One of the areas explored by researchers in recent years is sentiment analysis. This is a relatively new technique that processes natural language through an algorithm and categorizes text-based data into positive, negative, or neutral sentiment (Kearns, 2020). It can be of interest in order to obtain insights into users’ attitudes, thoughts, and emotions towards a particular issue. In this regard, it can also be applied

to social network content related to activist movements for the sake of deeper understanding (Al-Rawi, 2016). Therefore, the following research propositions are put forward:

**Proposition 1.** The sentiment present in UGC varies over time depending on the context in which the movement is located.

**Proposition 2.** The social movements of the 2010s show similar UGC characteristics, featuring mainly negative sentiments in the messages shared in social networks.

There is a term that has grown in popularity in recent years: filter bubble. This is a filter generated by algorithmic personalization systems whereby users would be exposed to a lesser extent to that news not fitting their ideology (Spohr, 2017). In the same way that this concept has been previously analyzed with the aim of investigating its role in political campaigns (Groshek & Koc-Michalska, 2017), it may be of great interest to analyze its impact on the evolution and network structures within social movements. Therefore, the following research proposal is put forward:

**Proposition 3.** Social media algorithms and the ‘filter bubble’ have had an impact on the UGC of social movements by creating a more polarized and radical discourse.

Social networks play an increasingly important role in the consumption of information and news (Spohr, 2017). Although the differences in information consumption habits between traditional media and social networks have been analyzed previously (Zhao et al., 2011), the possible particularities depending on the news’s nature remain unknown. Along these lines, it is relevant to analyze whether, in the case of social movements, there is a preference when it comes to users’ access to information. Therefore, the following research proposal is put forward:

**Proposition 4.** Users prefer to be informed about social movement issues via the UGC of social networks rather than by traditional media.

One area of research related to data visualization, and explored by Costanza-Chock and Rey-Mazón (2016), is the comparison between front pages of big media and the number of tweets published about a particular social movement. Following this research line, it is of interest to investigate the occurrence of homogeneous traits between the key messages and the sentiment expressed by traditional media and UGC in social networks. Therefore, the following research proposal is put forward:

**Proposition 5.** The coverage provided by the media is not proportional to the reach achieved by UGC in Social Media, nor is it aligned to the key concepts and sentiment expressed by users.

In the same way that social network users have a great power to mobilize for social causes, they can also organize themselves both for and against institutions or brands. In turn, brands can find in social movements a line of dialogue with their public by aligning themselves with the same purpose. This has been investigated both from a user perspective (Romani et al., 2015) and from the search for insights to apply to companies and marketing activities (Reyes-Menendez et al., 2020). Therefore, the following research proposal is put forward:

**Proposition 6.** Users’ perception of brand value has improved after the incorporation of messages related to social protests by companies and institutions.

The impact of gender on different dimensions of social networks, such as lexical variations (Baman et al., 2014), representation of images (Rose et al., 2012) or social identity (Wang, 2017) has been previously studied. In this line, knowing that gender can create a substantial variation in the use of social media (Volkova et al., 2013), the following research proposal is put forward:

**Proposition 7.** Gender modulates participation in social movements as well as the features and sentiment of the UGC.

## **CONCLUSION**

In the present study, the main social movements of the 2010s were analyzed through the UGC in Social Media. Regarding our main research question (“What homogeneous features are found in the purpose pursued by the participants of the different social movements when generating and sharing content on Twitter?”), an exploratory approach has been carried out through a case study and a systematic analysis of the textual content of three text-based data samples.

The results show homogeneous features between the movements, concerning four categories where the data collected from Twitter have been classified: an explanation of the movement, claims for social and political justice, exchange of personal experiences, or community building. In this way, not only is the research question answered, but the presence of homogeneous features between movements is confirmed. An area to discover through possible future research.

For this reason, the article proposes a detailed research agenda that is articulated around three main areas of study: Comparative analysis between movements, Analysis of evolution over time, and Analysis of changes resulting from movement. Always taking into account the wealth of the UGC of social networks as a source of data for its study.

## **Theoretical Implications**

In terms of theoretical implications, the present study offers a new perspective on the analysis of social movements in social networks. Not only from the theoretical framework of the UGC analysis of a movement, but the combination and comparison of the different social movements that occur worldwide. Therefore it is possible to generate a more global vision of how this phenomenon works. Accordingly, future studies can address the questions included in the proposed research agenda.

From the theoretical perspective, the results of the present study offer meaningful theoretical implications for individuals, organizations and institutions. The finding of an homogeneous thematic structure of messages generated by users opens the door to new research that broadens the similarities between movements and delves into the social implications that this fact may have. Researchers should focus on the future research areas proposed in order to gain a deeper understanding of social movements in which millions of people around the world are voluntarily involved.

Likewise, the worldwide social situation caused by Covid-19 has motivated that movements for social justice proliferated and were particularly active during the months of restrictions and confinement (Pleyers, 2020). This unprecedented situation, in the same way that favors social movements, may favor further research on this area.

## **Practical Implications**

From a more practical point of view, communications and marketing managers, as well as decision-makers from all kinds of institutions, can use the results of the present study as the starting point to develop their data-driven communications strategies. Nowadays, the population is increasingly demanding social and environmental involvement by brands and institutions. This is why it is essential for managers to have insights based on data, so they can join digital conversations held by numerous activists on social media.

Thanks to a deeper understanding of the opportunities and potential of big data of UGC available on social media channels, different stakeholders can design, adapt and elevate their marketing strategies.

Furthermore, as stated in recent research (Saura et al., 2021), in the digital ecosystem, data would be the new currency for businesses and companies, as the analysis and use of UGD can predict user behavior and analyze their actions.

## **Limitations and Future Research**

The limitations of the present study are related to the number of cases selected in the study, the sample analyzed in each case and the types of analysis used to analyze the data. In terms of future research objectives, the research propositions described above should be taken into account as starting points to establish new directions and lines of research focused on gaining a better understanding of the social movements in social media based on the analysis of UGC.

Furthermore, the categorical classification of the tweets, as well as the exploratory selection, can be taken into account as a limitation, since other studies have shown statistical significance and additional quantitative analysis in similar approaches. In the future, researchers can use these results to propose new constructs or variables for quantitative models, as well as follow the research proposals revealed in the present study.

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## KEY TERMS AND DEFINITIONS

**Social Movements:** sustained and organized collective actions to effect change in institutions by citizens or members of institutions who are excluded from routine decision-making (Amenta & Polletta, 2019).

**Cyberactivism:** the use of electronic communication technologies, such as social media, for various forms of activism to enable faster communications by citizen movements and the delivery of local information to a large audience (Sandoval-Almazan & Gil-Garcia, 2014).

**Hashtag Activism:** discursive protest on social media united through a hashtagged word, phrase or sentence (Yang, 2016).

**User-Generated Content:** material that comes from standard users who voluntarily create and publish different data, information and content, which is subsequently published and may be of interest to others (Krumm et al., 2008).


**Case Study:** research methodology based on an empirical inquiry that investigates a contemporary phenomenon in depth and within its real-world context (Yin, 2014).

**Content Analysis:** research methodology that comprises techniques for reducing texts to a unit-by-variable matrix and analyzing that matrix quantitatively to test hypotheses (Kohlbacher, 2006).

# Chapter 7

## Understanding Google Ads Metrics for SME

**Belem Barbosa**

 <https://orcid.org/0000-0002-4057-360X>  
*University of Porto, Portugal*

**Zaila Oliveira**

*Unichristus, Brazil & Unifametro, Brazil*

**Sandrina F. Teixeira**

*CEOS, ISCAP, Polytechnic of Porto, Portugal*

**Vasco Paço Gomes**

*University of Aveiro, Portugal*

### ABSTRACT

*Despite its popularity, search engine advertising is a particularly complex and demanding technique. One of the main challenges for Google Ads managers is to adequately monitor performance. Indeed, the literature identifies a plethora of metrics to measure the success of a search engine ads campaign. One research question arises: What are the metrics adopted by small and medium-sized companies to measure the performance of a Google Ads campaign? This chapter includes a mixed-method study with digital marketing professionals experienced in managing Google Ads campaigns for Portuguese SMEs. Interviews helped highlight the main difficulties faced by SEM's Google Ads' managers and to identify the performance measures they mostly control. Then, a survey enabled to analyse the association between performance measures and campaigns' perceived success. The insights produced by this chapter are particularly interesting for researchers, teachers, business managers, and digital marketing professionals, as it presents important clues on measuring the effectiveness of Google Ads campaigns.*

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## **INTRODUCTION**

Search Engine Advertising (SEA) is currently one essential tool for companies that wish to gain online visibility (Jafarzadeh et al., 2019; Winter & Alpar, 2020) and to attract more visitors to their websites. Being also known as search engine marketing or programmatic advertising (Saura, 2020), it comprises strategies to place adverts in search engines and banners or displays in partner websites. SEA consists of developing and managing ads to be featured in the top of search engine's results pages that are generated after the user entered a certain phrase in the dialogue box.

Although it is an instrument with great popularity among companies of almost any sector, the fact that the ads are shown based on relevance and not based on the highest bids (Geddes, 2014), enables smaller companies to compete with large companies using ad quality instead of budget (Geddes, 2014). Obviously, this creates a great opportunity for small and medium-sized enterprises (SMEs), to reach potential customers in a relevant way (Geddes, 2014; Gong et al., 2014; Klapdor et al., 2014; Lynch, 2015).

To use this tool effectively, companies should carefully follow users' conversion process and evaluate the return on your investment (Alby & Funk, 2011; Geddes, 2014; Google, 2021b; Jansen et al., 2009; Sculley et al., 2009). Monitoring the SEA campaign takes advantage of digital marketing measurability (Alby & Funk, 2011; Geddes, 2014; Google, 2021a; Jansen et al., 2009; Sculley et al., 2009) and enables real-time adaptation and improvement of campaign performance. However, due to their limited resources, SMEs may not be able to deal with the tool's complexity (Geddes, 2014; Jafarzadeh et al., 2019) and usually have insufficient resources to track all available metrics to measure their SEA efforts (Barry & Charleton, 2009; Jansen & Clarke, 2017).

Despite the plethora of metrics that the literature suggests measuring the success of a SEA campaign, this chapter proposes the control of five main metrics, which are associated with different stages of user interaction with the ad, from the beginning of his research until reaching one or more conversion points. These metrics are: clickthrough rate, bounce rate, conversion rate, return rate, and return on investment. As this chapter demonstrates, this proposal was validated by a group of marketing professionals, and the relationship of controlling these performance metrics on perceived success of the SEA campaign was explored.

This chapter includes an empirical study using mixed-method approach comprising interviews and an online survey. By combining qualitative and quantitative techniques, this study enabled to fully tackle the research question. Participants were digital marketing professionals with experience in managing Google Ads campaigns for Portuguese SMEs.

The insights produced by this chapter are particularly interesting for academics investigating and teaching topics related to SEA. They are also valuable for business managers and digital marketing professionals, as the chapter presents essential clues on measuring the effectiveness of Google Ads campaigns.

## **BASICS OF GOOGLE ADS**

Google is the most popular search engine in many countries around the world, including in Europe. Search engines have commonly one main source of income: advertising, in the form of sponsored links, that are featured in their results pages. For managing sponsored links, Google created on October 23, 2000 the Google Adwords platform, which was renamed and is nowadays called Google Ads. It allows advertisers to create, manage, and control their campaigns. According to Statista (2021), the revenue generated

by Google Ads platform totalized 146.92 billion US dollars in 2020. Google Ads comprises two types of advertising: search and display ads. The latter refers to advertising that is placed in partner websites and platforms beyond search engines and shown to users while they are browsing on the internet. These ads can be interactive and have various formats, such as image, video, and sound (Kotler & Armstrong, 2020). A search ad is displayed after the user initiated a query, by typing a phrase on the search engine dialogue box to find information on a specific topic. Search ads are then included in the search engine results page along with the organic results. These ads are usually in text format and may be confused with the search engine's organic results (Kotler & Armstrong, 2020). Although Google Ads enables to manage these two types of advertising, this chapter focuses only on search ads.

### **Main Advantages of SEA**

Search advertising is characterized by being a consequence of searches that the user performs on a search engine (Google, 2021b). Google's objective is to deliver advertising that perfectly tackles to the problem that the user is trying to solve with the search (Ghose & Yang, 2009; Lu & Zhao, 2014). This objective portrays SEA's added value - the relevance to the user (Chan & Park, 2015; Fain & Pedersen, 2006; Geddes, 2014). In addition to this, SEA also conveys several advantages that make it very attractive for companies.

#### **Payment**

The payment method for SEA is one of the first advantages that a company faces (Google, 2021a). The company pays for each click received by the ad (Geddes, 2014; Google, 2021b). As in the case of display advertising, marketing strategy may enable the company to pay per action. Hence, the payment will be calculated so that it is close to the clicks necessary for an action to take, and the company will pay the sum of those clicks (Google, 2021b). In traditional advertising or display advertising, payment is defined in terms of impressions. In that case, the company will pay for an estimated number of people who will see your ad, but that it does not know for sure whether they will be affected by it or not.

In contrast, SEA uses a model of pay per click. The click corresponds to a lead for the company's website. This lead is closely related to a valuable action for the company (Lynch, 2015), which means that the cost per acquisition in this type of advertising tends to be lower than in other advertising types of advertising (Animesh, Ramachandran, & Viswanathan, 2010).

#### **Control**

Related to the payment characteristics is another advantage of SEA: control. In this type of advertising, it is possible to control daily and monthly budgets and control how much the company pays for each click on any of the keywords (Geddes, 2014; Google, 2021b; Laffey, 2007).

#### **Measurement**

The most significant difference that Internet advertising has brought about from all other traditional advertising is measurement. This is particularly notorious in the case of SEA (Jansen et al., 2009). SEA enables the use of several metrics that will help measuring campaign performance and controlling each

keyword's performance (Geddes, 2014; Google, 2021b). In SEA, the advertiser can control its investments in detail and identify the strategies with most significant profits. As such, this is a major difference from other types of advertising (Sculley et al., 2009), allowing a very precise calculation of the return on investment (Alby & Funk, 2011).

## **Flexibility and Speed**

Cost control and the ability to measure any element of the campaign's success are leveraged by two other advantages inherent to SEA: flexibility and speed (Laffey, 2007). In fact, the ability to control costs and measure success would have a more negligible effect if it were not possible to perform real-time adjustments to any factor of the campaign such as ad copy, keywords, targeting, budget, and maximum bid, among others (Jansen et al., 2009). In SEA control is ongoing, as during the campaign the company can check the factors that are not having the desired performance and immediately change them so that its performance can be improved. These changes and the improvement of results are performed in real-time, allowing the company to quickly test various strategic options until reaching the desired performance (Geddes, 2014).

## **Relevance**

All the advantages discussed above add much more value to the company because they are combined with the most significant advantage of SEA - relevance (Geddes, 2014). This characteristic is the one that most distances SEA from other types of advertising (Gong et al., 2014). Indeed, the greatest advantage of SEA for advertisers is that their ad is shown only to relevant users who are looking for the information or benefit featured by the ad. So, the company can be confident that its investment is spent only show its ads to users looking for them (Klapdor et al., 2014). And that relevance is achieved through the segmentation available on Google Ads. The first targeting filter is the keywords that the user uses to perform a search (Lynch, 2015), but the company can also define the type of users that will see their ads. Hence, the advertised is allowed to target the person who sees your ads, including the following characteristics (Google, 2021b):

- Language;
- Geographic location;
- Devices used for performing the search;
- The time when the research is performed;
- Various demographic characteristics.

A wide range of targeting criteria gives the company great control over how it spends its search advertising budget and enables that almost everyone who would not be interested in reading its ads to be excluded (Geddes, 2014).

## **Consumer-Centered Process**

The ability to return results relevant to a user's search is almost exclusive to search engines (Klapdor et al., 2014). Although there are other ways to research a product or subject, their cost is much higher

for the user (Chen & He, 2011). Search engines offer users the ability to find information and enables companies to send advertising messages that are relevant for the issue faced by the user (Gupta & Mateen, 2014), reducing the level of intrusion that is usually associated with online advertising (Ghose & Yang, 2009). In fact, some authors (e.g., Fain & Pedersen, 2006; Gupta & Mateen, 2014; Laffey, 2007) suggest that the main determinant of SEA success is the ability to create synergy between consumer's need of information that helps solving his problem and the company's willingness to provide relevant information to its target audiences. Without surprise, SEA is the most significant source of income for search engines (Statista, 2021) and that organic results are their way of attracting enough users so that search engines become relevant advertising platforms for companies (Laffey, 2007). So, this strategy provides benefits for the three-party involved (Gupta & Mateen, 2014; Klapdor et al., 2014; Laffey, 2007), search engines, users, and companies. The essence of SEA resides in this intersection of benefits, since all stakeholders are interested in making the process go smoothly. As argued by Laffey (2007), the user is interested in finding information relevant to his problem, while the company needs to find the users with specific problems that can be solved by the company's products and services. As for search engines, they are service providers, and their profit depends on the satisfaction their service provides to both search engine users and advertising companies. Karande, Mehta and Srikant (2013) explained that search engines are interested in meeting the needs of both users and advertisers, while maintaining a long-term sustainable relationship with them. Thus, search engines must show the most relevant results to their users in order to increase the customer base it can offer to companies. By providing relevant results, search engines ensure that customers will continue to use their services because it facilitates their search process. The company continues to be interested in investing in SEA because it allows it to reach specific consumers.

### **Opportunities for SMEs**

Overall, it is important that companies actively collaborate in this process, providing relevant ads for search engine users. This is also essential for digital marketing results. Indeed, according to the findings by Sculley et al. (2009), the bounce rate of companies that follow good practices in SEA is on average 25% lower than the ones that don't focus on providing relevance. SMEs are no exception to this need to be guided by good search advertising practices. Murphy and Kielgast (2008) alert that SMEs often lose money with SEA, but that is because they do not make good strategic use of that advertising while large companies do. In fact, SMEs tend to compete directly with large companies in this advertising type when they should be doing the opposite (Geddes, 2014). Many of the keywords searched on a search engine occur infrequently, and SMEs have an opportunity to explore those low competition keywords that large companies do not usually explore. Large companies are generally concerned with the small percentage of words that are searched very often. SMEs must then take advantage of search advertising without competing directly with large corporations (Laffey, 2007).

### **Evaluating the SUCCESS of a Google Ads campaign**

Measuring the effectiveness of a SEA campaign is crucial (McDonald, 2014). All decisions made to improve the ad, change budgets, and change the various of a campaign must be based on its performance. As much as the manager's perception is that the campaign is being successful, if the numbers do not agree with that perception, he will have to make changes (Geddes, 2014). If there is no way to evaluate

the campaign effectiveness or if the control procedures are not adequate, the changes will be made based on wrong information. They may harm rather than improve the campaign's performance.

Numerous metrics are identified in the literature to measure the success of a Google Ads campaign and its various components:

- Impressions (Geddes, 2014; Google, 2021b; Zenetti et al., 2014);
- Traffic volume (Moral et al., 2014);
- Number of pages per visit (Moral et al., 2014);
- Average visit time (Moral et al., 2014);
- Bounce Rate (Moral et al., 2014; Sculley et al., 2009);
- Return rate (Lu & Zhao, 2014; Moral et al., 2014);
- Lifetime value of the customer (Geddes, 2014; Google, 2021b; Lu & Zhao, 2014; Smith, 2002);
- Click through rate (Barry & Charleton, 2009; Geddes, 2014; Google, 2021b; Jansen & Clarke, 2017; Jansen et al., 2009, 2013; Kim et al., 2014; Lu & Zhao, 2014; Sculley et al., 2009; Zenetti et al., 2014);
- Conversion rate (Barry & Charleton, 2009; Geddes, 2014; Google, 2021b; Jansen & Clarke, 2017; Jansen et al., 2013; Lu & Zhao, 2014; McDonald, 2014; Rutz & Bucklin, 2007; Zenetti et al., 2014);
- Return on investment (Alby & Funk, 2011; Barry & Charleton, 2009; Geddes, 2014; Google, 2021b; Jansen et al., 2013; Kim et al., 2014; Lu & Zhao, 2014).

Clearly, there are too many metrics for SMEs to follow efficiently. A set of metrics should be chosen to allow the company to measure the success of certain key elements of the campaign, to identify its weaknesses, and to amend deficiencies. Considering the consumer journey from the beginning of his search until reaching one or more conversions, a set of particularly important metrics stand out, and for that reason are proposed by this chapter to be the priority, especially for SMEs and other companies that lack resources for a throughout analysis of performance. This reduced set of metrics are: click-through rate, bounce rate, conversion rate, return rate, and return on investment. The next sections explain each of those metrics in detail.

## **Click-Through Rate**

Click-through rate is the metric most used by managers to measure the performance of Google Ads campaigns (Abrahams et al., 2014; Barry & Charleton, 2009; Chan & Park, 2015; Gupta & Mateen, 2014; Jansen & Clarke, 2017; Sculley et al., 2009). Saura (2020) explains that, by using data sciences, it is possible to measure and predict click-through rate, and consequently improve advertising profitability and overall success in terms of impressions and clicks. As point of fact, this metric is also the one that has more prominence in the Google Ads tool, mainly because it is the metric that most interests the search engines to measure (Chan & Park, 2015; Gong et al., 2014); this is the main metric to determine search engine's revenue. Still, the prominence of this metric causes many errors in measuring the efficiency of campaigns, as the company does not gain value per click, but rather by conversion (Abrahams et al., 2014; Jansen et al., 2013; McDonald, 2014). This does not mean that this metric has no use – on the contrary, it is very important. But it must be well-understood by ads managers.

Click through rate is a metric that allows analyzing the user's perception of the company's ads (Atkinson et al., 2014; Jansen et al., 2009, 2013). This metric is suitable for measuring consumer satisfaction with the displayed ad, but it does not serve to measure the experience that user will have with the landing page (Klapdor et al., 2014; Sculley et al., 2009) for the simple fact that when the user clicks on the ad, he has not yet interacted with the company's website. Kim et al. (2014) demonstrate that the click-through rate is critical to measure the ad's success, but that it cannot anticipate what happens after the click, and consequently cannot be used as a substitute of the conversion rate to calculate the ad's return on investment.

### **Bounce Rate**

The bounce rate measures the number of times that a user leaves the page shortly after entering it (Kotler & Armstrong, 2020). This means that the user did not find what he expected on the landing page and returned to the results page to find another alternative. This usually happens because expectations were created in the ad that were not met on the landing page. Hence, the ad was not clear about what was offered by the company and its website. As Sculley et al. (2009) stated, the bounce rate helps to measure user dissatisfaction, not satisfaction. Hence, the ads manager must use this metric to define whether the user's expectations are being met.

### **Conversion Rate**

The conversion rate is another metric frequently acknowledge as the best way to measure the performance of a Google Ads campaign (Abrahams et al., 2014; Barry & Charleton, 2009; Chan & Park, 2015; Gong et al., 2014; Jansen & Clarke, 2017; Sculley et al., 2009). This indicator measures the percentage of users who, when clicking on the displayed ad, also performed an action that brings value to the company (Geddes, 2014). This action is, thus, associated with one of the calls-to-action that the website provides, both on the landing page and on other pages that the user subsequently visited.

The problem is that, in order to assess ad performance, the conversion rate has to be something installed and defined by the company and directly associated with the campaign, which makes it less used as a measurement indicator (Barry & Charleton, 2009) despite being an essential metric to calculate the return on investment (Klapdor et al., 2014; Rutz & Bucklin, 2007; Smith, 2002).

### **Return Rate**

The return rate is what allows the customer's lifetime value to be calculated (Geddes, 2014; Smith, 2002). Regarding ads campaigns, if the company considers only the value of the first purchase that the customer makes, instead of the total value of the customer, it will not be able to make enough profit to cover the cost of acquisition (Smith, 2002). The return rate is considered a long-term rate that better calculates the value SEA creates for the company (Abrahams et al., 2014; Klapdor et al., 2014; Lu & Zhao, 2014). To be able to calculate the total value of each acquired customer, and consequently to set budgets correctly, the manager must measure the return rate and to understand the level of retention he gets on each acquired customer, that is to say, the rate of customers who make more than one purchase.

## **Return on Investment**

The return on investment is the metric that shows the global success of the campaign and is the metric that most interests managers (Ghose & Yang, 2008; Jansen et al., 2013). While the other metrics discussed above serve to diagnose low performances at certain stages of the customer journey, this one shows the campaign's success as a whole. It measures the profit that the company obtains for the amount invested in the campaign. It is the only indicator that allows the company to verify whether its campaign is profitable (Geddes, 2014; Google, 2021b). This indicator is also highlighted in the study materials of Google (2021b) and by several authors (e.g., Geddes, 2014) as the only one that effectively verifies whether the campaign performance is according to the perceived success.

## **THE VIEWS OF SMES ADS MANAGERS ON GOOGLE ADS SUCCESS METRICS**

Overall, analyzing the performance metrics of a Google Ads campaign is essential because it takes advantage of measurement opportunities provided by SEA (Alby & Funk, 2011; Geddes, 2014; Google, 2021a; Jansen et al., 2009; Sculley et al., 2009). However, due to their limited resources, SMEs may not calculate and track all available metrics to measure their search advertising efforts (Barry & Charleton, 2009). Thus, for this study, a research question was defined:

**Research Question:** What are the metrics adopted by SMEs to measure Google Ads campaign performance?

Based on the existing literature's contributions and considering the proposed research question, five research hypotheses were proposed, considering the relationship between the chosen metrics and the perceived success of the Google Ads campaign, similar to what Klapdor et al. (2014) did in their study.

**Hypothesis H1:** There is a positive relationship between the click-through rate and the perceived success of a SEA campaign.

The click through rate is the metric most used by companies to measure the performance of a SEA campaign (Barry & Charleton, 2009; Jansen & Clarke, 2017; Sculley et al., 2009). It allows to measure the user's perception of the ad, indicating the ad's success, thus contributing to measure the success of an important campaign item (Jansen et al., 2009; S. Kim et al., 2014; Sculley et al., 2009). A higher click through rate will cause an increase in the quality score, which in turn causes a decrease in the cost per click, decreasing the acquisition cost per customer, and thus contributing to the increase in the return on investment and consequently the perceived success of the campaign (Geddes, 2014; Google, 2021b).

**Hypothesis H2:** There is a negative relationship between the bounce rate and the perceived success of a SEA campaign.

The bounce rate is a metric used to measure user dissatisfaction (Sculley et al., 2009), which is related to the expectations created in the ad not being met on the landing page. When a customer gives up barely looking at the offer on the website, the company ends up buying an unqualified click, for a user that never had the intention to become a customer. This has a negative impact on the return on investment because resources are spent on a user who the company will not have a chance to convert. Consequently, there will be an increase in the bounce rate, which will decrease the perceived success of the campaign (Geddes, 2014).

**Hypothesis H3:** There is a positive relationship between the conversion rate and the perceived success of a SEA campaign.

The conversion rate is a metric that shows the success of the landing page and the advertised product or service in converting a user into a customer (Google, 2021a). Due to the need to configure it, this metric is not widely used by managers (Barry & Charleton, 2009; Jansen & Clarke, 2017), but it is an essential metric to measure the return on investment of a campaign, because when it is absent, it is impossible to understand the number of customers were acquired by the campaign and the cost at which they were acquired (Google, 2021a). The higher the conversion rate, the lower the cost of acquisition for each customer, and consequently the higher the return on investment and the perceived success of the campaign (Geddes, 2014).

**Hypothesis H4:** There is a positive relationship between the return rate and the perceived success of a SEA campaign.

It could happen that in a particular campaign the return on investment of the customer's first purchase is negative, since the acquisition cost exceeds the profit obtained by that acquisition (Smith, 2002). It is then necessary for the manager to monitor the return rate to be able to calculate customers' lifetime value and thus ensure that the investment made allows to maximize the profit obtained from the customer. A higher return rate normally associated with a higher lifetime value for the client, contributing to a greater perceived success of the campaign (Geddes, 2014).

**Hypothesis H5:** There is a positive relationship between the return on investment and the perceived success of the SEA campaign.

The return on investment is directly linked to the manager's perception of the success of his campaign, because the greater the percentage of profit obtained by each monetary unit invested, the greater the perception of success (Geddes, 2014; Google, 2021b). After choosing the method of calculating the return on investment according to the company's typology (Alby & Funk, 2011), this metric allows to verify if the campaign is being profitable and if that profit is in accordance with the defined objectives (Geddes, 2014; Google, 2021b).

## **Methodological Approach**

Considering the proposed research question, a mixed method approach qual → quan (Bryman, 2012) was carried out, in which each of the method typologies will serve to answer the research question in a complementary way (Bryman, 2012). In the first phase, semi-structured interviews were conducted, and in the second phase, an online survey was implemented.

The qualitative stage comprised semi-structured interviews with eight Google Ads campaign managers of Portuguese SMEs. Participants were recruited through the social networks of researchers' contacts and also by searching and contacting companies that were running Google Ads campaigns. The sample was selected through purposeful non-probabilistic sampling, using typical case sampling as a selection criterion (Patton, 1990). The interviews made by telephone and were recorded, transcribed and uploaded into the qualitative analysis program NVivo for coding according to the parameters that were sought to be researched.

The quantitative stage comprised an online questionnaire. The unit of analysis was one campaign carried out for a SME. With the adoption of the convenience sampling technique and using LinkedIn social network, all the profiles of Portuguese professionals who declared competencies with Google Ads were analyzed, and an individual and personalized email were sent to them. The questionnaire was applied only to Portuguese SMEs that used the Google Ads tool to carry out SEA campaigns. 144 valid responses were collected. From the metrics found in the literature review on Google Ads, five were



chosen that are linked to the path that a user takes in a Google Ads campaign, with the dependent variable “perceived efficiency of a SEA campaign” being added (Jafarzadeh et al., 2011), renamed to “the perceived success of a SEA campaign” (Table 1).

*Table 1. Variables considered in the study*

Success Metrics	Supporting literature
Click-through rate	(Barry & Charlton, 2009; Geddes, 2014; Google, 2021b; Jansen et al., 2009; Jansen et al., 2013; Lu & Zhao, 2014; Kim et al., 2014; Sculley et al., 2009; Zenetti et al., 2014)
Bounce rate	(Moral et al., 2014; Sculley et al., 2009)
Conversion rate	(Barry & Charlton, 2009; Geddes, 2014; Google, 2021b; Jansen et al., 2013; Lu & Zhao, 2014; McDonald, 2014; Rutz & Bucklin, 2007; Zenetti et al., 2014)
Return rate	(Lu & Zhao, 2014; Moral et al., 2014)
Return on Investment	(Alby & Funk, 2011; Barry & Charlton, 2009; Geddes, 2014; Google, 2021b; Jansen et al., 2013; Lu & Zhao, 2014; Kim et al., 2014)
Campaign perceived success	(Jafarzadeh et al., 2011)

The survey requested that the respondent considered one single campaign that he/she had conducted for a Portuguese SME, and that he had access to the campaign statistics. Then, for each of the five success metrics, one question was posed “For the following metrics, please indicate which you have controlled for that specific campaign”, with three response options: I controlled; I did not control; I don’t know. For the metrics that the respondent had controlled, the percent value of the metric was also requested. Perceived success of the campaign and some data for sample characterization was also requested.

The statistical analysis techniques were chosen considering the scales used in the questionnaire and the type of hypotheses that were sought to be tested. Three methods of statistical analysis were then used: univariate analysis, bivariate analysis, and multivariate analysis.

## **Qualitative Results**

The eight participants in the qualitative study have varied profiles in terms of professional experience and job (Table 2). The purpose of this option was to guarantee the diversity of the sample and a more comprehensive collection of information and opinions.

### **Participants Preferences Regarding Success Metrics**

Participants in this study unanimously recognized the usefulness of the five success metrics explored in this study, although not all of them used them regularly to control the performance of the Google Ads campaigns they conduct. Next sections explore in detail the views and experiences shared by the participants regarding each of those metrics.

## Understanding Google Ads Metrics for SME

Table 2. Interviewees' profile

Interviewee	Google Ads Experience (in years)	Job
Interviewee 1	0.25	Marketing assistant
Interviewee 2	2	Project Manager
Interviewee 3	1	Head of Marketing
Interviewee 4	1.5	Digital marketing consultant
Interviewee 5	5	Company manager
Interviewee 6	3	Head of digital marketing
Interviewee 7	7	Product manager
Interviewee 8	8	Head of search

### Click-Through Rate

In line with extant literature that indicates that click-through rate is the most used metric in Google Ads (Abrahams et al., 2014; Barry & Charleton, 2009; Chan & Park, 2015; Gupta & Mateen, 2014; Sculley et al., 2009), this metric was top of mind for all participants in this study when the topic of success metrics was introduced. Indeed, all respondents mentioned that they frequently checked Google Ads' click-through rate without even being mentioned by the interviewer. For example, Interviewee 1 said that "... every day the first thing I do in the morning is to see this, how were the impressions and the clicks from the previous day." Some participants also confirmed the growing awareness that the click-through rate does not measure the total success of the campaign (Atkinson et al., 2014; Jansen et al., 2009, 2013) with statements such as that of the Interviewee 8 who said that

*A few years ago, the main metrics were the cost per click, impressions and clicks or click-through rate, but they are that are now less important. I mean, they are still important, but now we look more at conversion metrics, such as conversion cost and conversion rate.*

Regarding the usefulness of this metric, Interviewee 5 supports the idea that the click-through rate helps to evaluate users' perceptions on the ad, but in some cases companies advertiser companies decide to focus on this metric anyway depending on the main objective of the campaign "... if [the company] just wants to generate traffic to the website (...) the main [metric] to follow will be the click-through rate".

### Bounce Rate

Bounce rate was mentioned by most of the interviewees, although two interviewees mentioned that they did not follow it, and one said that they followed it, but only occasionally. Interviewee 3, for example, justified the lack of monitoring of this metric due to integration difficulties, referring that "This is something that I have to explore better. I tried to connect analytics with Google Ads, but (...) it didn't work". Interviewee 5 agreed with the views that the primary utility of bounce rate is to measure whether or not the user's expectation was met on the landing page (Sculley et al., 2009), stating that it serves "to assess the quality of the landing page, but mainly to validate the quality of the ad in conveying the correct information". Interviewee 4 revealed that bounce rate is also followed for other purposes when he

stated that “it is a metric that we use a lot, not only in terms of the campaign but also in search engine optimization”.

### *Conversion Rate*

Almost all respondents agreed that conversion rate’s control is important (Abrahams et al., 2014; Barry & Charleton, 2009; Chan & Park, 2015; Geddes, 2014; Gong et al., 2014; Sculley et al., 2009), although some were unable to control it. Interviewee 4 described that “the most important sign is conversions, and, in the end, this is what matters to the [company]” and added that it is essential to calculate the return on investment because “with it we see the cost we have for conversion and if the investment in the campaign is worthwhile.”

Some reasons were given for not controlling this metric. Interviewee 3 revealed that he had difficulties connecting the website to Google Ads, and Interviewee 2 reported that he also had to wait a long time to install conversion tracking. However, he was able to start controlling it afterwards. Interviewee 1 admitted that he did not intensively control the conversion rate because “we are working more on the objective of increasing impressions, clicks, but conversions are not yet a goal for us”.

### *Return on Investment*

It was verified in these interviews that, although not everyone uses it, the interviewees recognize the importance of return on investment (Ghose & Yang, 2008; Jansen et al., 2013). For example, Interviewee 3 stated that “The ultimate goal is selling. Visits are always of interest, but what matters is that at least in the medium term there is a return on investment”. In addition to the reasons already mentioned above by the interviewees for not measuring the conversion rate, Interviewee 6 explained that in his case the return on investment is not yet estimated because “management still considers that we are in the launch phase, we are in the market for a short time, and we are aware that initially we will have to make a bigger investment”.

### *Unpopular Success Metrics*

Several metrics were often less popular for different reasons, namely because they are time consuming and difficult to implement. Still, conversion rate was stood out for being disregarded by all participants.

### *Return Rate*

Despite the need mentioned in the literature review to calculate the return rate to understand the true potential of a customer (Abrahams et al., 2014; Klapdor et al., 2014; Lu & Zhao, 2014,) almost none of the interviewees controlled it. Interviewee 4 stated that he did not carry out this control for small companies, referring that “some [agencies] do it, but more so for medium and large companies... From my experience in managing ads accounts, small and medium companies do not do that job so much”. The same interviewee justifies the low adherence to this metric with the time needed to control it: “in my opinion, it pays off (...), but it takes a lot of work, it does, but I understand that (...) small companies cannot do it “.

## Additional Metrics Considered by the Interviewees

During the interviews, some respondents repeatedly mentioned two additional metrics that admittedly could be considered to understand user's search path: cost per click and impression share. Their views and arguments are shared in the following subsections.

### *Cost per Click*

The cost per click consists of the amount paid by company for the clicks that the ad receives from users (Saura, Palacios-Marqués & Iturricha-Fernández, 2021). In the case of Google Ads, it cannot be higher than the maximum bid defined by the company (Geddes, 2014; Google, 2021a). According to the interviewees, this metric essential to control the success of the campaign because it allows them to observe the limits of their spending when it is not possible to calculate the return on investment. As explained by Interviewee 5 “the cost per click is also a fundamental metric. We don't want to spend too much money on these companies, money they actually don't have”. Hence, the interviewees assumed that having a low cost-per-click is often considered one of the main indicators of campaign success. Still, it is important to note that this metric is not possible to associate cost per click with any digital marketing objectives, so considering it a main indicator for SEA campaign success is controversial, despite the common views of interviewees.

### *Impression Share*

Impression share is a metric provided by Google Ads that indicates the percentage of times an ad was shown when eligible to do so (Google, 2021b). For example, an ad may have been offered a hundred times, but there were two hundred searches for that ad, in which case the impression share would be fifty per cent. An ad may not be shown when it is eligible for budget reasons only. Either the daily budget ran out, and the ad can no longer be displayed on that day, or the maximum bid was so far below the competition that it ended up not being qualified for the ad slots (Geddes, 2014; Google, 2021b).

According to some respondents, this metric is essential to understand the potential of the ads and the keywords being featured. As Interviewee % explained, “for a company that fills the impression share by fifty per cent, I know that it still has another fifty per cent of the search that can be worked on”. So, this metric provides useful information to understand the campaign and plan future campaigns. As Interviewee 8 said, “for those campaigns, we were able to define for which are the competitors what is their position, and what impression share they are achieving”. So, the impression share enables to analyze, for a particular ad that is having good results, if increasing the budget or maximum bids allows an increase in the number of conversions while maintaining the return on investment stable (Geddes, 2014). Clearly, despite the undeniably usefulness of this metric, its ability to measure success of a campaign is very limited. Still, it is interesting to note the importance it was given by the interviewees.

## Final Notes on the Qualitative Results

The qualitative study enabled to identify the metrics that were more supported by the Google Ads managers that participated in this study, along with the reasons for adopting some metrics and neglecting others. Only one of the metrics was commonly adopted by all participants: click-through rate. Other metrics were considered valuable but presented difficulties in implementation or were considered very

time consuming, and for that reason were often discarded. Moreover, one of the proposed metrics, return rate, was deemed as more adequate for medium and large-size companies, and hence not a good fit for SMEs. Except for the return rate, the participants acknowledge the relevance of the set of metrics proposed by this article to measure the success of Google Ads campaigns conducted by SMEs.

Finally, the participants stressed the importance of two other metrics, which they pay a lot of attention to: cost per click and impression share. Despite their importance, it is important to note that these two metrics cannot be directly associated neither with digital marketing objectives, nor with the user’s journey. In fact, both those metrics have a more operational nature, and depend on the decisions made by the manager namely regarding the budget, as well as the decisions made by the competitors. For that reason, those two metrics were not included in the set proposed by this chapter, and are considered complementary metrics, especially useful to plan future campaigns.

### **Quantitative Results**

A total of 144 Google Ads campaign managers participated in the quantitative stage of this study. Participants had diverse experience with Google Ads. 25% had up to one year of experience, and 19.4% had been working with Google Ads for more than 4 years (Table 3). All of them had executed SEA campaigns with Google for Portuguese SMEs.

*Table 3. Participants’ experience with Google ads*

<b>Years of experience</b>	<b>Frequency</b>	<b>Percent</b>	<b>Cumulative percent</b>
From 0 to 1	36	25.0	25.0
From 0 to 1	36	25.0	25.0
From 2 to 4	28	19.4	60.4
From 4 to 6	29	20.1	80.6
From 6 to 10	20	13.9	94.4
From 10 to 15	8	5.6	100.0
Total	144	100.0	

### **Metrics Controlled by the Respondents**

Table 4 presents the metrics controlled by the respondents of the survey, and the reasons for not controlling certain metrics. In line with the findings of the qualitative study, this study found that the most controlled metric by the respondents is the click-through rate (77.1%). This great adherence to click-through rate is also explained by that fact that this is the only metric in this study’s list that is provided by Google Ads without any further preparation (Geddes, 2014; Google, 2021a). Hence, it is surprising that the biggest reason for not controlling this metric is the lack of access (6.3%), which might indicate that these managers only created the campaigns but did not control their performance.

## Understanding Google Ads Metrics for SME

Table 4. Controlled metrics and reasons for not controlling

Metrics	Click Through Rate		Bounce Rate		Conversion Rate		Return Rate		Return On Investment	
	Frequency	%	Frequency	%	Frequency	%	Frequency	%	Frequency	%
<b>Controlled</b>	111	77.1	67	46.5	84	58.3	30	20.8	52	36.1
<b>Not controlled</b>	20	13.9	56	38.9	40	27.7	89	61.8	71	49.3
<i>No access</i>	9	6.3	23	16.0	20	13.9	41	28.5	45	31.3
<i>It is difficult</i>	6	4.2	10	6.9	10	6.9	17	11.8	16	11.1
<i>It is not important</i>	5	3.5	23	16.0	10	6.9	31	21.5	10	6.9
Do not know / No answer	13	9.0	21	14.6	20	13.9	25	17.4	21	14.6
<b>TOTAL</b>	144	100	144	100	144	100	144	100	144	100

The conversion rate was the second most controlled metric (58.3% of the respondents). Of the managers who did not control this metric (27.7%), most reported that they did not do it because of lack of access, which can be explained by their difficulty in installing this control, as suggested during the qualitative phase of this research and pointed out by extant literature (e.g., McDonald, 2014).

The bounce rate occupies the third place of the most controlled metric (46.5% of the respondents). Still, more than half of the managers participating in this study do not control it. The main reasons for not controlling this metric are the lack of access, which was explained in the interviews by the difficulty of managers in combining website analytics with Google Ads, and also considering the metric unimportant.

The return on investment appears in fourth place, with 36.1% of managers controlling it, which is something surprising given the difficulty of obtaining data from other metrics to calculate them. Precisely for this reason, it appears that the biggest reason for not controlling this metric (49.3% of the respondents) is the lack of access.

Lastly, 20.8% of the respondents control the return rate. After the interviews' conclusions, it was already expected that this would be the least controlled metric. This metric proved to be quite unpopular among managers, with the highest percentage of unawareness, and it is also the metric that most managers considered unimportant for their campaigns.

Table 5 presents the descriptive statistics for the metrics controlled by the respondents of the survey.

Table 5. Descriptive statistics

Variables	Click-Through Rate	Bounce Rate	Conversion Rate	Return Rate	Return On Investment
<b>N</b>	111	67	84	30	52
<b>Mean</b>	18.4%	31.9%	16.3%	21.2%	90.9%
<b>Median</b>	10.0%	25.0%	7.7%	13.0%	22.5%
<b>Standard deviation</b>	0.2306	0.2385	0.2208	0.2494	1.6520
<b>Minimum</b>	0.0%	0.0%	0.0%	0.0%	-19.4%
<b>Maximum</b>	100.0%	100.0%	100.0%	100.0%	100.0%

## Test of Hypotheses

Considering the dimension of the sample and the characteristics of the variables, Spearman's correlation was chosen for testing the hypotheses defined for this study. As explained by Bryman (2012), Spearman's correlation enables to identify the relationship's strength, the meaning of this relationship and its statistical significance. As described above, the hypotheses defined for this study focus on the relationship between each of the five performance metrics proposed by this chapter for SMEs (Table 5) and the perceived success of a SEA campaign that the respondents had performed.

So, regarding the most popular metric used by managers in this study, it was found that the correlation between click-through rate and perceived success of a Google Ads campaign is very low (0.095) and that this correlation is not statistically significant ( $p > 0.05$ ). Hence, this study does not empirically support the hypothesis H1.

In the case of bounce rate, the relationship with perceived success of a SEA campaign was negative as expected, but it was very low (-0.130) and that this correlation was not statistically significant ( $p > 0.05$ ). Consequently, Hypothesis H2 is not supported by this study.

It was also found that the correlation between the conversion rate and the perceived success of a SEA campaign is low (0.141) and that this correlation is not statistically significant ( $p > 0.05$ ). Consequently, it is concluded that this study does not provide empirical support to research hypothesis H3.

Regarding the metric that was shown less popular both in the qualitative and the quantitative study, return rate presented very low and negative (-0,076) correlation with the perceived success of a SEA campaign. Moreover, this correlation is not statistically significant ( $p > 0.05$ ). As such, this study does not support research hypothesis H4.

Finally, it was found that the correlation between return on investment and the perceived success of a SEA campaign is strong (0.449) and that this correlation is statistically significant for a 99% confidence level ( $p < 0.01$ ). Consequently, this study provides empirical support to the research hypothesis H5.

## Final Remarks on the Quantitative Results

The quantitative results are consistent with the ones obtained in the qualitative stage of this study, namely by confirming the unpopularity of the metric return rate. The possible reasons for this unpopularity refer to the difficulty of computing this metric, and the fact that Google Ads managers do not consider it essential to measure their campaigns' success. This has emerged in both qualitative and quantitative analyses.

Overall, this study demonstrates that Google Ads campaign control is often disregarded by SEMs ads managers. Indeed, even the easiest metric to control, click-through rate, which is provided at no cost by Google Ads tool, is not adopted by all the participants in the quantitative study.

More importantly, only one metric, return on investment, was strongly associated with the perceived success of the campaign.

## FUTURE RESEARCH DIRECTIONS

Despite the importance of search engine marketing in general and SEA in particular for practitioners, research on the topic is still scarce. This chapter provides some interesting cues on how managers as-

sess campaign performance and provided rich anecdotal evidence from both qualitative interviews and quantitative survey.

Still, this study suffers from several limitations that prevent results from being generalized, and that need further validation from future research. One main limitation faced by this study is related with the sample dimension. The fact that the survey had 144 valid responses did not enable the use of multivariate analysis techniques and the comparison between groups (e.g., type of SEA experience or sectors of activity of the advertiser company). It is recommended that future research considers the inclusion and comparison of campaigns from different sectors. Indeed, most literature focuses on the analysis of one specific company (e.g., Abrahams et al., 2014; Alby & Funk, 2011; Atkinson et al., 2014; Ghose & Yang, 2008, 2009; Klapdor et al., 2014; Moral et al., 2014; Rutz & Bucklin, 2007; Zenetti et al., 2014). Surveys enable to collect data not only from several companies but also from several sectors, which could be compared in the case the samples are large enough. Additionally, future studies may compare these performance measurements with the ones used in social media (Saura, Palacios-Marqués & Iturricha-Fernández, 2021), considering that some social networking sites are gaining importance as search engines.

It is also recommended that future research considers other metrics and different indicators of campaign success. In the case of this study, it was considered the perceived efficiency of a SEA campaign, following Jafarzadeh et al., (2011). Obviously, managers' perceptions might not be the best indicator for campaign success and performance, so future research could test alternative indicators for that dependent variable.

## **CONCLUSION**

This chapter identified the main difficulties faced by Google Ads managers and the main performance measures they use. Interviews with managers enabled to collect information on the popularity of Google Ads metrics and the justifications for choosing the metrics used. It was possible to observe a general acceptance of the metrics, but the return rate was particularly unpopular. It was also found that Google Ads managers face two difficulties in managing their campaigns - insufficient budget and limited access to the website and other company data. During the quantitative phase of this research, it was possible to understand which metrics SMEs use the most to measure the success of their campaigns. The metric with the most significant adoption by Google Ads managers was the click-through rate, which is in line with what is advocated in the literature (Abrahams et al., 2014; Barry & Charleton, 2009; Chan & Park, 2015; Gupta & Mateen, 2014; Sculley et al., 2009). It was followed by the conversion rate, which was also adopted by the majority, but not by all, despite being an essential metric to measure the success that the SEA campaign in terms of reaching new customers (Abrahams et al., 2014; Barry & Charleton, 2009; Chan & Park, 2015; Gong et al., 2014; Sculley et al., 2009) and to assess the profitability of this type of advertising (Klapdor et al., 2014; Rutz & Bucklin, 2007; Smith, 2002). In the respondents' case, the return on investment was controlled by a little more than one third of the respondents. This percentage is low for the importance that this metric has (Ghose & Yang, 2008; Jansen et al., 2013), because it shows managers whether their campaigns are succeeding and making a profit for the company (Geddes, 2014; Google, 2021b). The return rate was the metric least controlled by respondents. Although this rate is essential to measure the long-term success of the company's investment in Google Ads (Abrahams et al., 2014; Klapdor et al., 2014; Lu & Zhao, 2014), this result was not surprising due to the difficulty in gathering the necessary information for its calculation (Geddes, 2014).



In terms of the link between the manager's perception of success and the metrics used to measure the success of the campaign, we found that the return on investment was the only one that had a strong correlation with perceived success, which is in line with the literature (Geddes, 2014; Ghose & Yang, 2008; Jansen et al., 2013; McDonald, 2014).

Another difficulty encountered during this research was the difficulty in configuring the metrics and linking the account to the managers' analytics data. Measurability is one of Google Ads' advantages (Geddes, 2014; Google, 2021b) and may be lost due to this difficulty. This conclusion about the difficulty in calculating the metrics and their lack of access being one of the main reasons for not being controlled can justify an intervention by Google and other search engines with similar services to facilitate their configuration. Indeed, facilitating the articulation between analytics and SEA tools will enable managers to optimize their resources better and to make the most informed decisions possible (McDonald, 2014).

This chapter makes two main contributions. It offers valuable information for managers involved or intending to perform SEA. Indeed, the chapter explains the importance of adopting adequate metrics to control and evaluate the campaigns, and makes important suggestions on which to choose, even in a context of limited resources, which is often the case of SMEs. It also makes an important contribution to the literature, by systematizing contributions scattered in the literature on SEA, by sharing relevant empirical data, and by stressing the urgency of expand research in this topic.

Overall, it is recommended that managers carefully monitor their SEA campaigns, particularly by adopting the set of five measures that are suggested in this chapter. By doing so, it is possible to assess different stages of user interaction with the ad, and adequately monitor its efficacy and return on investment.

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### **KEY TERMS AND DEFINITIONS**

**Bounce Rate:** The percentage of visitors to a website that leave it (i.e., returns to the search engine) without navigating on the website. It is an indicator of website rejection.

**Click-Through Rate:** Percentage of the ad impressions that resulted in a click, and consequently the user was redirected to the website (i.e., the landing page).

**Conversion Rate:** The percentage of visitors to the website that perform a certain action intended by the ad (e.g., subscription or purchase).

**Return on Investment:** Profitability of the ad campaign that results from the difference between the revenue of the campaign and its cost.

**Return Rate:** Percentage of visitors to the website that repeat their visit.

**Search Engine Marketing:** Digital marketing activities that enable a company or brand to be featured in search engines result pages and encourage users to click and visit their web pages. It comprises two main tactics: search engine advertising and search engine optimization.

**Search Engine Results Pages (SERPs):** The pages presented to search engine users after they type a certain phrase on the dialogue box. It includes natural results and often also sponsored links (i.e., ads).

## Chapter 8

# Big Data Optimization in Zara: How Zara Will Optimize Its Process With Big Data Due to the COVID–19 Situation

**Paula González-Padilla**

*Rey Juan Carlos University, Spain*

**Carlota Galán Zori**

*Rey Juan Carlos University, Spain*

### **ABSTRACT**

*This chapter will address the issue of online sales in the fast fashion sector, specifically Zara, the flagship brand of the Inditex textile group. Since 2012, Zara has been working on a plan to close, restructure, and optimize its physical shops, a process that was accelerated in 2017, and which has been affected by the global pandemic that began in early 2020. These two events have caused online sales to exponentially rise with, in turn, the percentage of returns. This is the objective of this chapter: to analyze where Zara is in terms of online sales and returns and how, through digital marketing and the application of tools such as big data, it can reduce the large volume of online returns that it has to deal with.*

### **INTRODUCTION**

This chapter will address the issue of online sales in the fast fashion sector, specifically Zara, the flagship brand of the Inditex textile group, founded by Spanish entrepreneurs Amancio Ortega and Rosalía Mena in 1974, and home to other brands such as Massimo Dutti, Pull & Bear, Zara Home, Uterqüe, Stradivarius, Bershka, and Oysho.

The Inditex group currently sells in 96 markets through more than 7,000 physical shops, as well as through its online sales platform, present in 202 markets. Specifically, 2,208 physical shops belong to the Zara brand, which opened its first shop in 1975 in A Coruña, Spain.

As its corporate website states, “Zara’s priority is to offer attractive and responsible fashion to a wide range of customers, at the time and place that best suits their needs. Its designers have the capacity to

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respond with agility and new ideas to their demands and comments in its women's, men's and children's collections".

Since 2012, Zara has been working on a plan to close, restructure and optimize its physical shops, a process that was accelerated in 2017, and which has been affected by the global pandemic that began in early 2020. These two events have caused that online sales have exponentially raise, and in turn, the percentage of returns.

This is the objective of this article, to analyze where Zara is in terms of online sales and returns and how, through digital marketing and the application of tools such as big data, can reduce the large volume of online returns that it has to deal with. Despite having an efficient platform in terms of online sales, possibilities will be sought to improve some aspects that will increase sales and, above all, decrease the high percentage of returns, thus causing a positive effect on the overall results of the company.

With a digital marketing strategy based on techniques for obtaining results through big data, the objective of achieving greater optimization of sales can be covered, using consumer segmentation resources combining morphological, image and fashion parameters.

## **THEORETICAL FRAMEWORK**

Since 2012 Zara has been working on a plan to close, restructure and optimize its physical shops, a process that was accelerated in 2017 (Contreras, 2019), and which has been affected this year by the global pandemic.

In June 2020, three months after the pandemic broke out, with the consequent temporary closures of shops around the world, Inditex announced a loss of 409 million euros in the financial year from February to April of the same year. It was the first time in the group's history that it made a loss. Consequently, the plan was accelerated and it was announced the closure of between 1,000 and 1,200 shops worldwide during 2020 and 2021, and the opening of another 300.

With these closures and openings, the aim is to gain in sales area but reduce the number of shops, thus continuing with the plan to update the spaces already defined in 2012, where larger shops with a greater possibility of customer flow, spaces already prepared and designed to work with the latest commercial integration technology, and of course, always under the concepts that define their shops and online platforms: beauty, clarity, functionality, and sustainability.

With this plan, the company also announced the investment of 1,000 million euros to boost online sales so that they account for 25% of the company's total sales, through a strategy of anticipation of digital transformation. And 1,700 million euros to update the integrated platform from which the shops, the head office and the distribution centers work, its own technological base called Inditex Open Platform (IOP), which is being updated and on which all the company's digital operations are carried out, from orders and distribution management, inventories, purchases, etc. (Neira, 2019).

The company's objective with the implementation of this plan is to advance the total implementation of the so-called integrated shop, a concept in which the customer can have a continuous and permanent link with the shop, wherever he is, whenever he is, and from any device.

As mentioned above, the evolution of the fast fashion giant was shaken by the global pandemic that has affected the entire planet (Kumar, Raut, Narwane & Narkhede, 2020). Covid-19 began to impact the company in February 2020, when some countries began to close borders, businesses, enforce curfews, and everything that in the following months would become the daily routine in all developed countries.

## **Big Data Optimization in Zara**

Despite the historic losses, as it had never recorded a negative year, the company managed to overcome and obtain a total profit of 671 million euros in the first nine months of the year, and 866 million in the third quarter, despite having 5% of the shops closed, and a total of 88% of the remaining shops around the world with restrictions on capacity and opening hours.

Sales were -44% in the first quarter, -31% in the second quarter, and -14% in the third quarter, and online sales continued to grow strongly, reaching 75% at constant exchange rates in the first nine months, and 76% in the third quarter.

Because of the shop closures, the fact of stopping distribution and/or reducing it considerably to adjust to the new and scarce demand, operating expenses were reduced by 17% during the first nine months of the year. Inditex's strong recovery in the third quarter of the year allowed to increase its net financial position by 7%, reaching 8,265 million euros, the highest in Inditex's history.

Despite the difficulties faced, Inditex managed to open shops in 25 markets last year, including China, Saudi Arabia and Russia. And it increased to 85 the markets with online sales integrated to the local network of shops, which are added to the 106 markets that already have online sales through the website.

Ending the year with these good figures only denotes the company's great management and coordination capacity between its different areas, logistics, design, product, manufacturing, shops and online. It also demonstrates the company's great capacity to adapt to change, and how its digital transformation strategy has enabled to achieve remarkable results.

Another example of how the pandemic affected the sector can be found in Mango, a few days before the state of alarm was declared, the firm presented its best results in three years and was immersed in a plan of changes to adapt to customer demands. During 2020 the Catalan textile company had a 43% drop in sales in physical shops, obtaining a turnover of 1,842 million euros, while the previous year it reached 2,374 million. If it were not for the performance of online sales, with an increase of 36%, the figures would be even more negative. Achieving 42% of turnover through online sales is a great achievement for Mango, as it is above the average for the sector.

Within this capacity for adaptation, and focusing on Zara, it has been seen how the collections proposed by the design team captivated customers as they introduced a lot of comfortable clothes following, as always, the market trends. While Zara has always been characterized for having a very cosmopolitan line, with more sophisticated and trendy options and a wide variety of clothes focused on the different needs of the day, whether they are more casual lines, or office wear, or even events, as the months went by, by mid 2020 the focus and bulk of the garment offer was focused on comfortable clothes, options that could be used both at home, teleworking, or going for a walk in the street. The clothing options for events or parties were limited, and the more casual collections gained ground.

Despite all the positive aspects in terms of profit figures and customer response in terms of sales, the truth is that 2020 was the hardest year for the company, having to continually adapt to the different changes that took place, restructuring teams, laying off staff, hanging production and distribution times, and losing a large volume of sales in physical shops.

One of the main problems concerning the online sales is the returns, the rise of internet consumption and the return policies, favorable to the consumer, causes the customer to purchase products being less conscious than when they do it in person (Cullinane, Browne, Karlsson, & Wang, 2019). This extrapolated to a global purchasing and return trend has large economic and environmental costs (Frei, Jack, & Krzyzaniak, 2020).

Spain is currently in fourth place in the ranking of product returns due to new consumer habits, now it is common to buy product in order to try them on, and this habit means 20% of returns in e-commerce



and up to 30% in the case of online commerce in the textile sector (Komorova, 2020). The percentages are very altered if we compare them with the figures that are given in shop, as these are usually between 6% and 10%.

## RESEARCH QUESTIONS

As mentioned before, the current situation is bringing up some questions the author might give answers to.

In this respect questions such as how the psychology and sociology of the consumer is changing and have changed due to this recent complex situation, or how does the shutdown of stores is affecting the company and the consumer will be raised.

Therefore, the research questions addressed in the present study are as follows:

**RQ1:** *How does the shutdown of stores will affect the customer?*

In order to work with the objective of improving sales and reducing the online returns it is important to analyze how these stores shutdown will affect the customer's purchase options, what are their purchase habits, what does influence in their decision making and what characteristics are the ones that define the Zara's customer.

**RQ2:** *How does the shutdown of stores will affect the companies?*

Also it is extremely important to analyze how Zara works in order to evaluate what does implies these shutdowns for the company, how is their ecommerce channel, what characteristics does manifest in this moment and see the possibilities for improvement.

**RQ3:** *How is the consumer affected and how the companies could help?*

As previously mentioned, the relationship marketing will run an important role here, as the psychology and sociology of the consumer is one of the most affected aspects. In this sense, the relationship marketing will advocate for a focus on the customer and not into a product-price approach as it was done in the past.(Ryals, L., & Knox, S.,2001).

The environment, concerns and priorities of the customers have changed in these last decades due to the internet or globalization, but the biggest change has occurred now with the pandemic situation.

According to a recent study of the OCU (Users and consumers organization), compared to the previous situation prior to COVID 19, 53% of the consumers are no longer going to cultural events, 51% does not practice any sport in close places, 31% doesn't even use public transport.

This is drastically changing the way the consumer behaves and interacts with the goods and service and at the end with the brands behind it.

The companies, in this sense, are experimenting new needs in consumer behavior. In this sense, the main objective of these ones will be to understand their needs, their new fears and try to find new ways to reach them.

**RQ4:** *How to obtain a sale of better quality? How could a sale not divert into a return?*

With the previous extracted data and examples from other cases, a line of work could be drawn up in order to give answer to this big volume of returns that the company is facing

**RQ5:** *What tools will be used?*

Zara has already some strong technological resources that well focused can generate a change in the customer's purchasing process, and therefore, in the success of the sale, influencing in reducing the percentage of return possibilities.

## **METHODOLOGY**

The “exploratory case study” methodology is chosen for this analysis. This is an “investigation strategy focused on understanding the actual trend in individual environments” (Eisenhardt, 1989). The study we present is focused on a recent phenomenon and extremely topical, therefore we consider important to use this methodology that measures the people’s behaviour through qualitative tools and not just quantitative, which means an added value in variety in the investigation and richness of it (Martínez, 2006).

The documentary observation is part of this study. The nature of the consulted sources is very wide but it predominates the documents published on the internet. We will find studies, scientific articles, academic journals and reports focused on fashion. We can’t forget the bibliographic documents, advertisement and public relations’ articles, marketing and new technologies, blogs and websites of the sector.

## **RESULTS**

In this section, we report the results concerning the mentioned questions.

### **RQ1: How does the Shutdown of Stores will Affect the Customer?**

Inditex’s plan to close and restructure its fleet of physical shops and its commitment to e-commerce, together with its commitment to the digitalisation of services, has led to a change in the company’s relationship with customers, who now have greater expectations of a more convenient and faster shopping experience (Surplise, 2020).

This adaptability towards the customer is also marked by the tendency of customers to use both the more traditional shopping channel, with physical shops, and online sales channels. These last ones are gaining in popularity day by day thanks to the convenience they offer and the time savings invested in shopping.

However, even though there is a large part of consumers who have adapted to new technologies and now live with them as part of their daily lives, there is still a percentage of consumers, those of older generations, who are resistant to online shopping.

Physical shops are still the bulk of Zara’s sales, and the closure, whether it is temporary due to the current health situation or permanent due to the restructuring carried out by the company, is leading to a change in the customer’s shopping options.

Thanks to the pioneering technological strategy it has been developing over the last few years, creating a homogeneous experience and maintaining omnichannel coherence, Zara is the brand in the textile sector with which consumers interact the most, reaching 21.8%, according to an article published in the IE University.

Zara’s customers are young, ranging from teenagers to middle-aged people, both men and women, and have a clear tendency to follow fashions and to be able to wear clothes without spending a lot of money. They are usually customers who know the brand well, know that every few weeks they receive merchandise and offer new products, go to the shops (whether physical or online) on a recurring basis to look, see what’s new, keep up to date on trends, and usually end up buying an article they like.

Having a predominantly young target audience, very adapted to the digital era, it is not such a negative problem to close shops, but it is important to take a step further in the personalisation of the website so that it affects as little as possible in terms of total sales of the brand (Nisar & Prabhakar, 2017).

## **RQ2: How does the Shutdown of Stores will Affect the Companies?**

In the last decades the textile industry has changed and evolved in a voracious way, being a traditionally physical sector. Sixty years ago, fashion products were bought exclusively by the upper class of society; with the appearance of shops like Zara, the course of the industry changed completely and, for some years now, it has been a mass market. A market that adapts to the purchasing capacity of its customers, and which relies on technological advances to make their shopping experience as satisfactory as possible while achieving greater profitability (Kim, 2020).

The sector is immersed in a profound business transformation, focusing its efforts on the development of a digital strategy (Pedrajas, 2020). Not having such a large number of shops spread across different parts of the cities has had and will continue to have a negative impact on sales, as not as many people will be able to access their physical shops and have the option to buy.

The strategy of closures combined with the strengthening of the digital strategy means that Zara wants to redirect the customer's shopping process. The aim is to maintain shops with characteristics more similar to a showroom, spaces with a wide variety of garments but with very little stock of each one of them, prioritising shop space over warehouse space, and redirecting sales to the online channel. The customer, therefore, will go to the shop to see the product, look at the fabric, try on the size, and finish the purchase process by ordering it online.

Zara has been working for some months now with tools that allow interaction between the physical and online channels and vice versa, i.e. when a customer sees a garment on the website, they can locate the exact point where the garment is located in the shop they select, having the option of arriving at the shop and going directly to the point where their product of interest is located, they can also reserve a fitting room for a specific time (as long as the customer is in the shop at the time of making the reservation and with a few minutes to go).

Similarly, a customer can reach the specific web page of the garment they are holding in their hand simply by using their mobile phone and without the need to have the Zara's app. By taking a photo of the QR on the label, the web page opens with the selected garment, allowing them to obtain all the detailed information about the garment, its composition, care, the other colours in which it is available, washing care, variety of sizes, and also to be able to buy it online.

The customer experience plays a fundamental role in Zara's new strategic plan.

## **RQ3: How is the Consumer Affected and how the Companies could Help?**

Taking into account the current situation, the mentality of the customer about the consumption of any service or good has changed. The two main reasons are the fear about the health situation and the second one will be the preoccupation about the economic situation of not just his/her country, but also about the whole world.

Questions such as "will I get infected if I go outside my house?" or "should I save money just in case the situation gets worse?" are appearing daily in the mind of the consumers. The uncertainty about the situation is one of the main pains for the consumer nowadays, that makes him less impulsive, having

## **Big Data Optimization in Zara**

a more thoughtful shopping conduct. Also, this new consumption is characterized by being in a local environment and introducing more and more the digital platforms. The introduction of digital platforms has been one of the main tools to keep connected to the outside world and combat the loneliness.

It does worth to mention that many of these new ways will continue to exist after the pandemic, they came to stay. For example, home office is one of the practices that is increasing the most, compared to the previous situation. Now the companies have realized that they can save money avoiding expenses such as the rent of the office.

So, this new paradigm is changing the dynamic of the customer daily. Therefore, companies such as Zara needs to change the perception about how the customer is now.

What is clear is that the digital field is becoming more present in the minds of consumers, trying to solve the new fears and needs that the author mentioned they have. But, even that, the companies are not fully adopted to that situation, only 5% of companies consider that they dominate digital to the point of outperforming their competition (Accenture, 2020).

Companies must create positive experiences for their customers in their channels, the improvement of the digital experience and the customer experience will be strictly related. Therefore, according to Accenture, the key drivers for the digital transformation would be: Profitability, customer satisfaction, customer experience, trade speed and the revenue increase.

So, what are the main mistakes the companies are making that makes that percentage of digital adoption so low? First of all, they don't measure the results. To make any change, you should draw the action points or guidelines in order to measure the results. For that, the objective should be clear. The second error will be not knowing what the following steps on a digital transformation process are and the third one not knowing who should be leading this change. (Reinares, P., 2018).

These errors make the approach of the companies to the consumer much more difficult. In this sense, the companies should start changing their concept and ways of recapping information from them. The traditional ways could not be bridging the expected results so new ways such as the use of social networks or big data could be the solution to their problems.

Analysis techniques such as User Generated Content (UGC) based on an extraction of content in social networks such as Twitter or Facebook, could bring the patterns the consumers conceived about certain topics. For instance in this study, we could be using the LDA method (Latent Dirichlet Allocation) to gather the keywords related to fashion, stores or Zara. With this information then the company could analyze the sentiment behind each of those concepts with a technique called SA (Sentiment Analysis) in order to know how the customer feels about each of those concepts.

All these mentioned analyses are not just bringing more real and accurate results but also they are less expensive than traditional ways of learning about our customers.

Another important aspect will be to understand how loyal Zara's customer is (Shoemaker, S., & Lewis, R. C.,1999). For that it is important to analyze the purchase repetition and the attitude of the customers about Zara's product and brand. In this sense the classification of the customers will be divided in:

- Loyal - high repetition and high attitude
- Latent loyalty - low repetition and high attitude
- False loyalty - high repetition and low attitude
- No loyalty - low repetition and low attitude

Then, the classification of the customers of Zara will be identified in Loyal and Latent Loyalty.

Other variables of rational classification of the customer are the consumer volumes, the purchase potential, the rentability, the duration of the purchase, the importance of the alternative brands and the level of satisfaction and how Zara can influence in it.

#### **RQ4: How to Obtain a Sale of Better Quality? How could a Sale not Divert into a Return?**

Zara's strategy is based on an exhaustive control of all processes, design, manufacture, distribution, and sales, as mentioned above, always aimed at getting as close as possible to customer demand. In this way, decisions are made quickly, for example, if a garment is successful, a replacement product or a new version of the same product, in other colours, fabrics, etc., can be in the shop in a matter of days.

This process, which is also common in other competing shops, can take between three and five months on average. Zara, and Inditex in general, has so much information on its sales and customers, and such a large production and logistics capacity, that it can speed up the processes until they are reduced to a minimum.

One of Zara's most outstanding characteristics is that it has taken this concept to its maximum expression. It is no longer only decided at a global level whether to produce more of a garment or collection, but it is the shops themselves who, according to their sales data, request and decide on the assortment of garments, sizes and models. In this way, we work in a much more localized way, based on the target of that specific shop, adapting not only to the customer, but also to the climate and even to the events that take place in that city during a specific period of time. These details are what generate great brand value, increasing the brand's competitive advantage.

Today, Zara works under three premises that define its positioning and business model: high product turnover, customer experience in its physical and online shops, and the adaptation of the use of new technologies in all its processes and spaces.

Online sales in the fashion industry were already well established before the global pandemic, the numbers reflected this, and the upward trend meant that company teams were working tirelessly to improve the online customer experience.

There is no doubt that e-commerce, as well as being one of the great challenges of the last few years, has been a turning point for many companies once they have found themselves in a situation like the current one. Closed shops, restricted opening hours and capacity, reduced mobility of the population, low tourism, all of this has led to a boom in online commerce, which in turn has been of vital importance to save the serious economic situation caused by the lack of physical sales.

Although ecommerce has many advantages, it is important to highlight that there are some key points in this type of sale that determine its success. Specifically, in the textile sector, it has certain characteristics that make it difficult and affect the percentage of returns that shops accumulate. It is not the same to buy an electronic device with all the functions detailed on the website and all you have to do is wait for it to work as described, as it is to buy a piece of clothing, which in addition to complying with the premises and descriptions on the website, has to be adapted to your measurements.

Returns in this type of products, and in the online market in general, are one of the problems that the brand must face.

The most common are due to sizing, even if the customer knows his or her size in Zara, there are always variations from one model to another depending on the design or fabric, and there are many times when they do not get it right. Other times, precisely because of these doubts about the size, it is

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the same customer who prefers to buy two units in different sizes, to finally keep the one that fits him or her well, generating a safe return. Then there is the issue of colours, the photos on the web do not always accurately represent the reality, it is difficult to get it because it can affect the light or the retouching of photography, and another important factor is that although the fabric is detailed, it is not so common for customers to know the names or mixtures of compositions.

Other causes are the fact that the product arrives defective, and a very common one, which is repeated especially in periods of sales or discounts, is the return due to compulsive buying. Customers attracted by prices buy more than they need or what they had planned, not having the garments in hand makes them lose awareness of the real number of garments they are acquiring, and once the shipment arrives it also brings a regret of part of the purchase made, which leads to a return. At this point we can highlight a practice that also directly affects returns, the so-called wardrobing, which consists of buying, wearing and returning the garment. Despite the fact that teams are trained so that there is no room for these returns, it is very common for used garments to be returned every day in shops all over the world.

It is not easy to reduce the number of returns, especially considering the current situation, but there are strategies that, if applied properly, can help reduce the number and prevent them from increasing (Thaw, Mahmood, & Dominic, 2009). Zara already applies some of them:

**Provide detailed information:** the website specifies many details of each garment, obviously the availability of sizes, the colour, if there are more colours of the same model, the description, the price, the composition of fabrics, the place where it has been manufactured, the reference, access to the size guide and equivalences with other countries, a system to define what your size is based on your characteristics, the care for washing and preserving the garment, etc.

**Aligning the quality perceived on the website with the quality of the product:** another reason that happens frequently is the “gap” between the perceived quality online and the real quality of the product. Zara works very well on its web staging, taking care of the photography and editing so that the cut, the colour and the fabric are perceived in a representative way. It is necessary to avoid any possibility that could lead the customer to feel deceived. High-definition images and videos should therefore be offered to help the customer better appreciate the details of a product. Disappointment and the feeling of having been cheated are two reasons for opting to return the garment.

**Monitor returns:** working with systems that allow you to know which customers return which garments is very important to keep track of returns and to be able to work on that basis (Orghazi, Karlsson, Hellström, & Hjort, 2018). This information can both tackle problems and create or add information to a customer’s profile, being able to suggest future purchases of garments that ensure greater success by avoiding the purchase and return of similar garments. In addition, even though garments undergo controls before arriving at the shop, on numerous occasions manufacturing defects have been detected through repeated customer returns.

**Cross-selling:** cross-selling is a technique that offers or shows the customer products related to each other, it is widely used in ecommerce as it is very easy to apply it in a very visual way on the web, it is usually found under labels such as “related products”, “other customers also bought”, or in the case of Zara a: “maybe you are interested in”. The particularity of this technique is that it is focused on the product, that is to say, on crossing garments that can complement each other, but it does not apply or interfere with any other tool that takes into account the customer’s need or preference. Therefore, this is carried out thanks to a good study of the brand’s catalogue of garments, and to have a clear prescription of which garments can be crossed and suggested to each other (Ansell, Harrison, & Archibald, 2007).

The cross-sell represents a benefit of between 10% and 30% of sales for an online shop, and Amazon states that they are at 35%. As can be seen, this is a very important factor to consider as it increases the average spend per customer, provides an outlet for products that are not so widely viewed, and provides purchasing patterns for different customers.

## **RQ5: What Tools will be Used?**

To talk about big data is to talk about companies obtaining a large volume of data, which can be obtained through different means, but in this study is particularly interesting the obtention of data through the actions and interactions of network users (Saura, 2020). This data by itself does not have a great value, it is when it is analyzed and divided according to the needs of the companies, when it is very useful to make strategic decisions and optimize the different processes, reduce costs, solve internal problems, or for example, bring to the market new products totally focused on what the consumer demands.

The architecture of big data covers so much and has so many nuances that, despite having been implemented in large companies for several years now, there are still certain doubts about how to optimize its use. Dealing with the management of all the data that a company can collect is a job that requires a lot of planning and strategy.

Through case studies, an analysis has been done about how companies have implemented big data effectively. One such pioneering and successful company is the e-commerce giant Amazon.

Amazon already has a great deal of experience in handling data, and it is common for what the company does to be extrapolated to other companies with common interests. Amazon gives masterclasses in collecting, analyzing, and then implementing that data analysis successfully.

The customer experience from the moment they open the Amazon homepage, provided they are logged in, is fully personalized. They are presented with products similar or related to purchases and/or searches they have made previously. In addition, the user periodically receives e-mails with news about products that may be of interest to them. These practices are very common nowadays in ecommerce, but Amazon was one of the first to put them into practice.

Over the years, it has been proven that offering a more personalized online experience leads customers to buy more than they would if they had not previously received specific product information. Amazon makes concrete and efficient use of the vast amount of data it obtains through big data thanks to its key consumer-driven approach (Hewage, Halgamuge, Syed, & Ekici, 2018).

This last point is one of the most important in Amazon's use of big data. While other companies also have the ability to collect large amounts of data, not all of them make such useful use of it. The ecommerce giant has an extreme approach that has brought the company to the successful place where it is today. When you are talking about collecting and analyzing so much data per second, it's easy to lose track of what to do with it and how to make it work for your business. You have to make a good plan to optimize it and find a use for it for the customer and, of course, to translate it into sales. It is also important to be able to implement changes and updates constantly.

Amazon is undoubtedly one of the great examples of how big data works, and how this technology, put at the service of both the customer and the company, can lead to business success regardless of the size of the company that applies it.

As we have seen previously, cross-selling is a very good technique for increasing sales, and if you add all the information available to Zara with big data, you can reach a perfect alliance. Not only by visualizing a product of interest to the customer, they will see other related products, but the product or

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products that are suggested to them will be more personalized, knowing which patterns they buy most often, what type of garment or fabric, and other variables that are sure to make the shopping experience successful.

Customized cross-selling generates a greater possibility of a sale and its consequent success as it is something more related to the customer, so you are less likely to be returned.

## **CONCLUSION**

The main objective of this study was to analyze Zara's strategy to be able to respond and solve the problems facing ecommerce, the drop in sales in physical shops, and the large volume of returns.

As a consequence of all of the above, the most important point to highlight is the possibility and recommendation to optimize such a powerful tool as big data. Zara receives a very significant amount of data through each of its purchases, especially from online sales.

All this data, for now, is used to optimize its production processes based on the sales statistics of each product, evaluating by area, city, country, and personalising the garments it has in each of its shops. In addition, these data are used in the design and distribution processes.

What has been detected and is proposed as a point of improvement is to use this data to influence customers' next purchases, taking advantage of the strong competitive advantage it has and all the tools it has available.

Through a digital marketing strategy based on data analysis of each customer who shops on the website, patterns can be created to ensure a higher volume of purchases and a lower volume of returns, for which specific products could be suggested for each customer:

- Newsletters: Zara already uses this tool to send emails to its customers with the latest news on the website, it does so on a weekly basis, and includes special collections according to the dates on which it is sent, but it does not make a specific selection of items for the specific customer, nor does it differentiate between sections. It would be more efficient to send newsletters with new items of related garments to their customers, as well as to select garments according to the section in which they most frequently shop, whether in men's, women's or children's wear.
- Zara.com home page: the website does not suggest clothes at any time according to previous searches by the consumer, this is a differentiating factor in how Amazon and Inditex use big data. If it were to introduce this change on the website, it could obtain great results, just as Amazon has done.
- Personalized cross-selling: the fast fashion giant does use this resource on its website, but not in a personalized way; as soon as the potential customer accesses a specific garment, garments or products related to it appear, with the aim of completing an outfit. However, this selection does not take into account the data that the customer may have left previously, either by preferences in terms of colours, shapes and design of the garment according to their size, etc.
- Customer page: in this section of the website where the customer can consult their orders, previous purchases, return policies and other data, it would be very efficient to suggest garments based on previous purchases, again applying a personalised cross-selling technique.



With all these recommendations the author suggests to keep investigating in big data, knowing better his customer and how this customer is changing. In this sense, spending more time where the customer is Zara will obtain better results and could mitigate issues they had such as the strong figure on returns.

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## **KEY TERMS & DEFINITIONS**

**Omnichannel retailing:** omni-channel means establishing a presence on several channels and platforms and enabling customers to transact, interact, and engage across these channels simultaneously or even interchangeably.

**Ecommerce:** is the sale of goods and services through the Internet, requires companies to tailor their business models to capture Internet sales.

**Big Data:** refers to massive complex structured and unstructured data sets that are rapidly generated and transmitted from a wide variety of sources. Will play a key role in the future of fast-moving industry like fashion (Kim & Lee, 2018).

**Marketing strategies:** a business's overall game plan for reaching prospective consumers and turning them into customers of their products or services.

**Cross selling:** is a technique that offers or shows the customer products related to each other, it is widely used in ecommerce as it is very easy to apply it in a very visual way on the web.

**Internet of things:** IoT refers to management and collection of daily use data from connected devices. This also includes order and identification of new features that help personalize and offer new products and services and to create new needs (Saura, 2020).

## Chapter 9

# Confirming Digital Marketing Model Innovation Design: SEM in Post-COVID Social Impact Startups, Mexico

**Juan Mejía-Trejo**

*Universidad de Guadalajara, Mexico*

### **ABSTRACT**

*The COVID-19 pandemic is an unprecedented event that has ravaged emergent economies like Mexico seriously. In this sense, several sectors like social impact startups (SIS) are called to participate in actions to recover more quickly in their operations, income, and competitiveness in the post-COVID era. In fact, digital marketing campaigns are alternatives for the Mexican SIS to raise its competitiveness again. Hence, this study aims to confirm the digital marketing model innovation (DMMI) through covariance-based structural equation modeling (CB-SEM) applied on a survey of 180 Mexican SIS during Dec-2020 to Feb-2021. The study's value is the model's validity of DMMI and its capability to determine digital marketing strategies to overcome emergency situations like COVID-19.*

### **INTRODUCTION**

The Covid-19 crisis and the next normal are unprecedented phenomena that have severely affected all sectors of the industry's products and services in Latin America. It has hit the productive and business structure with weaknesses that have arisen over decades. The region's productive structure presents a significant heterogeneity between sectors and companies. More than a third of formal employment and a quarter of Gross Domestic Product (GDP) are generated in sectors strongly hit by the crisis. The industry's impact would lead to a change regressive structural with the closure of 2.7 million companies. However, the measures adopted by the different governments of Latin America have been important but insufficient. To face the crisis, government institutions, business chambers, and academic centers have called for innovation initiatives, such as launching startups (CEPAL, 2020).

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## **Confirming Digital Marketing Model Innovation Design**

However, in Mexico, 75% of startups closed their business after the second year of existence, which means that only 25% of them remain up-to-date (El Financiero, 2016).

The Covid-19 pandemic and the next normal have triggered and accelerated the shift to the automation and digitization revolution to the next normal. Several manufacturing companies are reconfiguring their production lines and supply chains. On the other hand, service organizations are emphasizing their adaptation to digital customer travel and contactless operations. These changes will impact the workforce's skills requirements and capabilities, from the impressive increase in remote and homework to new tools and urgent safety and health requirements. Approximately 39% to 58% of work worldwide in operationally demanding sectors can be automated using currently demonstrated technologies (McKinsey, 2020a).

Thereby, the study's originality lay in the update and usefulness confirmation of each of the factors, variables, and indicators involved in the DMMI proposed by Mejia-Trejo (2018) and applied to SIS determine advanced digital strategies for the next normal post-Covid era in Mexico.

## **LITERATURE REVIEW**

This section describes the social impact of startups (SIS), its meaning in Mexico, the Oslo Manual and the concepts of innovations and how is related with the Digital Marketing Model Innovation (DMMI) as a pre-Covid era.

### **The Social Impact Startups in Latin America**

In Latin America, several online platforms are generating information about social impact startups. For instance, AngelList (ANL, 2020), the investors are using this database looking for information about startups for their decisions, being Brazil, the country with the highest number of startups in Latin America, followed by Mexico. According to ASPEN (2017), in Mexico, are registered 416 SIS, with more than half aimed to work with social impact interest; Mexico is the country where SIS ecosystems are more distributed in its territory, with 32% of startups in Mexico City, 10% in Guadalajara, and 8% in Monterrey (OECD, 2016).

The social impact startups (SIS) have emerged as key drivers of job creation due to economic growth and are often the source for radical innovation. During the coronavirus (Covid-19 pandemic and the next normal) crisis, the SIS has played a critical role for economies to the next normal. Some innovative new SIS have responded quickly and flexibly to the pandemic, which is essential to help many countries switch to digital education, work, and health services, provided innovations in medical goods and services. Some examples include adjusting commercial products (such as snorkeling masks for oxygen supply in hospitals); launching a series of digital health services, including Covid-19 and the next normal trackers, remote patient monitoring and remote consulting tools; the introduction of “no-contact” food delivery; and provide researchers and scientists with artificial intelligence solutions, remote working tools or online learning and entertainment, in some cases free of charge. (OECD, 2020).

### **The Meaning of the Social Impact Startup in Mexico**

The SIS is also known as technology-based firms. It represents projects born from the detection of needs, such as marketing knowledge, which is applied to provide market or industry solutions. An SIS is usu-

ally defined as a new business initiated by an entrepreneur through a combination of business ideas and resources. An SIS is a temporary organization that aims to search for scalable and repeatable business models (Blank & Dorf, 2012).

Ries (2011) explains that SIS are organizations established to create new services or products under highly uncertain conditions including new government business units, large companies, non-profit organizations, and commercial enterprises.

Due to their articulation and sophistication, they usually originate within a higher education institution due to their ability to carry out basic and applied research (Monge-Aguero & Briones-Peñalver, 2012). Startups' origin is based on the spin-off concept in the mid-twentieth century in the US, particularly in higher education centers like the Massachusetts Institute of Technology (MIT) and the University of Berkeley.

These institutions were the pioneers in the commercial exploitation of the investigation results operating a model where they received government support. Many countries have considered this model's success for wealth generation, and they are committed to university reforms to increase the commercialization of publicly generated research results (Monge-Aguero & Briones-Peñalver, 2012).

It is interesting to observe that the self-employed with tertiary education (OECD, 2017), a precondition to conform an SIS for Mexico, has a 21.3% of men and 15.6% of women (ahead of Spain: 17.3%/10.2% and behind of Italy: 30.2%/19.9%), establishing a clear competitive advantage about the rest of the countries.

In general terms, the development of new companies that are managed by any of the actors (students or research teachers) is similar. However, it changes direction in the name of the final result, which is marked by rights over the intellectual property of knowledge between those involved.

Finally, and this will lead to classifying the new company in one of two options: spin-off, if the technology belongs to the institution of higher education and its research teachers, or startup if the idea and knowledge that it is exploited is the property of the student (Gómez-Zuluoaga, 2019).

Additionally, the social impact startups concept is defined here as a "*social impact startup (SIS) that is aimed to solve one or several of the 17 sustainable development goals*" determined by the United Nations (UN, 2015).

Unfortunately, the Covid-19 pandemic and the next normal ravaged that economic backbone by failing to contain the loss of 12.5 million jobs in Mexico. The country's employed population fell from 55.7 million in March to 45.4 million in April of 2020 (El Financiero, 2020); this means 2.1 million formal jobs versus 10.4 million informal jobs.

The fall was caused by the following causes: a) The closure of supply chains, b) The fall in tourism, c) The stoppage of non-essential activities in the country, d) The lockdown of Mexican families in their home caused internal consumption to fall, lowering production and affecting employment and e) Support actions by the Mexican government were insufficient for microenterprises to be able to preserve employment. However, what about the startups? Besides all of the above, most startups have a common denominator: they usually fail. However, there is a minority that beat the odds and experienced some common traits. They work tough right from the start and move extremely fast to attract great talent, first-time customers, and extra funding. Hence, this study aims to determine factors and indicators involved as a reliable business model innovation scale, capable of maintaining the successful momentum of the startups that respond quickly to market changes, focus on results, and deliver value to customers (McKinsey, 2020b).

## **The Oslo Manual Business Innovation Model**

The Oslo Manual is an essential reference for the analysis and collection of data on technological innovation. It is a guide that defines concepts and clarifies the activities that are part of the innovation process, including its different types and the performance impact at the organization, thus advancing the knowledge of the global process. The updating and use of the Oslo Manual contribute to the implementation of a technological culture currently under constant development. The Oslo Manual strongly affirms that innovation must be measured. The last edition, published in 2018, describes the concept of innovation as an activity and its result, giving the following definition:

“An innovation is a new or improved product or process (or a combination thereof) that differs significantly from the unit’s previous products or processes and that has been made available to potential users (product) or brought into use by the unit (process)” (OECD, 2018, p.20).

The business model covers several aspects such as the manufacturing, logistics, marketing, and collaboration solutions used (the core business processes). To achieve strategic goals and objectives, it includes the top products that a company is selling now or in the future. For instance, a company may use one or several business models simultaneously, for different markets or product lines (OECD, 2018, par. 3.51). On the other hand, a business model innovation has not a single recognized definition due to variations from the business model with partial innovations affecting only its business functions or products to comprehensive innovations involving the business model for both business functions and products (OECD, 2018, par. 3.52).

Of great interest are the comprehensive business model innovations due to they can substantially affect economic production and supply chains, transform and create new markets. They can affect how the company creates for users, utility (product innovation) and how the product is manufactured, marketed or priced (business process innovation) (OECD, 2018, par. 3.53).

Hence, here we adopted the concept of a social impact startup as a business model innovation according to OECD (2018) “...it relates to changes in a firm’s core business processes as well as in the main products that it sells, currently or in the future” (p.242) and it is inspired by one or several sustainable development goals (UN, 2015).

## **The Digital Marketing Model Innovation (DMMI)**

Digital marketing campaigns are alternatives for the Mexican SIS to raise its competitiveness. The DMMI is a model that describes and identifies all the variables and indicators involved in designing and driving a digital marketing campaign. It was a product of a previous bibliometric analysis using VOSviewer software on the SCOPUS and Web of Science databases to detect variables and items. A Delphi Panel Focus Group and the Analytic Hierarchy Process (AHP) (Saaty,1997), was applied under three digital marketing professors (academic vision) and three CEOs’ digital marketing to identify final different variables and indicators that support the DMMI. The importance of such model is the capability to design a plan of action to achieve a long-term or overall aim (Kingsnorth, 2019; Mejía-Trejo, 2017) to the improvement of reduction and lower costs, price, and placement (Goldfarb & Tucker, 2019).

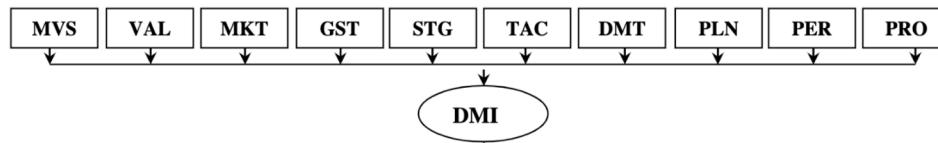
A final questionnaire survey was applied between Jan-Apr 2017 over 400 subjects (200 CEO digital marketing experts, 100 consultants, and 100 academics). In that time, as a quantitative stage (empirical evidence), multiple linear regression and correlation techniques were applied to determine the relationships in this model, proving the model’s reliability in the pre-Covid era.

In this paper, the DMMI was analyzed under the Covariance-Based Structural Equation Modeling (CB-SEM) to prove its model’s validity in the post-Covid era. See Figure 1 and Table 1.

Figure 1. DMMI scheme

MVS. Mission-Vision; VAL. Value Proposition; MKT. Market; GST. Goal Settings; STG. Strategy; TAC. Tactics; DMT. Digital Marketing Tools; PLN. Planning; PER. Performance; PRO. Profitability

Source: Mejía-Trejo (2018)



## RESEARCH METHOD

The procedure to prove the DMMI’s validity implied a final questionnaire survey applied between Dec-2020-Feb 2021 over 180 social impact startups CEOs’ intervention (expert vision) in the relationship of the model’s ten variables. Also, the CB-SEM was applied based on EQS 6.2 (Mejía-Trejo, 2019) following the recommendations suggested by the OECD (2008) to prove the model’s validity. Furthermore, determine the digital marketing strategies as the final result in post-Covid Mexico’s era.

## RESULTS

Before starting the CB-SEM, it is necessary to compute the Confirmatory Factor Analysis (CFA) that specifies a “*measurement model*”, which describes how the measured variables “*reflect certain latent variables.*” Once these measurement models are considered satisfactory, researchers can explore path models (called “*structural models*”) that link “*latent variables*” (Thompson, 2004). CFA is strongly suggested to be used as a construct validity tool that examines the constructs’ relationships in the broadest sense. Constructs are unobservable and theoretical (latent factors or variables).

Nonetheless, due to their unobservability, related theories often describe the relationships amongst the constructs. The “*construct validity*” refers to a measure of checking attributes (or constructs) that are not operationally defined or directly measured (Harrington, 2009). In CFA, researchers can “*constrain*” or “*fix*” specific parameters to mathematically “*allowable*” values and “*release*” the use of input data to obtain estimates of other model parameters (Thompson, 2004).

### The CFA-SEM Conceptual Model Measurement Validity

The measurement scale’s validity used the CFA-SEM with EQS 6.2 software to apply the maximum likelihood method (Byrne, 2006). To prove the measurement scales’ reliability, we computed for each factor the Cronbach’s Alpha and Composite Reliability Index (CRI) (Bagozzi & Yi, 1988) with results that exceeded the recommended value of 0.7 for both. This means that there is evidence to prove the scale’s internal reliability (Nunnally & Bernstein, 1994; Hair et al., 2010). Average Variance Extracted

## Confirming Digital Marketing Model Innovation Design

Table 1. Digital marketing innovation model (DMMI) underlying factor

Item	Variable	Indicator
1	Mission-Vision (MVS)	<ul style="list-style-type: none"> <li>Your firm considers the mission and vision involved in the digital campaign for competitiveness.</li> <li>Your firm considers the trademark, as a strategic asset to be used in the digital campaign design for competitiveness</li> </ul>
2	Value Proposition (VAL)	1. Your firm identifies and applies the value proposition in the digital campaign design for competitiveness
3	Market (MKT)	2. Your firm has an specific market segmentation as a target to be attended for the digital campaign for competitiveness.
4	Goal Settings (GST)	3. Your firm determines in the digital campaign design for competitiveness, as a goal to reach, to increase: <ul style="list-style-type: none"> <li>The branding positioning</li> <li>The number (real &amp; potential) of customers database</li> <li>The sales</li> <li>The product &amp; services (current and new ones) information</li> </ul>
5	Strategy (STG)	4. You firm determines in the digital campaign design for competitiveness, as strategies to apply: <ul style="list-style-type: none"> <li>Awareness</li> <li>Engagement &amp; Loyalty</li> <li>Desire &amp; Experience</li> <li>Effectiveness on Call to Action</li> </ul>
6	Tactics (TAC)	5. Your firm considers the use of Digital Marketing Tools for each strategy in the digital campaign for competitiveness, such as: <ul style="list-style-type: none"> <li>Awareness (SEO/SEM; Affiliate &amp; Partner Marketing; On line Advertising; On line PR; Social Media)</li> <li>Engagement &amp; Loyalty (Content Marketing; Newsletters &amp; eMail Marketing; e-Contact Strategy; Customer service &amp; support; Mobile Marketing; Social CRM; Blogging)</li> <li>Desire &amp; Experience (Augmented Reality; Virtual Reality, Wearable Marketing)</li> <li>Effectiveness on Call to Action (Home &amp; Site-Wide Page; Landing page design; Search and Browse Page; Basket and Checkout; Social Commerce)</li> </ul>
7	Digital Marketing Tools (DMT)	6. Your firm is in constant surveillance to determine what kind of digital marketing tools are ready to use in the digital campaign design for competitiveness
8	Planning (PLN)	7. Your firm design a strong program, with schedule and times to implement the digital marketing tools, in order to obtain obtain results in the digital campaign design for competitiveness
9	Performance (PER)	8. Your firm determines the KPIs for performance monitoring to determine on real time, the current performance of the digital campaign for competitiveness. Use of the Web Analytics.
10	Profitability (PRO)	9. Your firm makes profitability analysis, on permanent way to determine on real time, the current profitability of the digital campaign for competitiveness.

Source: Mejía-Trejo (2018)

(AVE) is represented from the fundamental construct and the observed variables (Fornell & Larcker, 1981); mainly, the values desirable are high than 0.6 (Bagozzi & Yi, 1988). We used in this research the comparative fit index (CFI), the non-normed fit index (NNFI), the normed fit index (NFI), and the root mean square error of approximation (RMSEA) (Bentler & Bonnet, 1980; Byrne, 2006; Bentler, 1990; Hair et al. 2010). The values in the range from 0.80 to 0.89 represent a good fit of CFI, NNFI, NFI, and (Hair, et al., 2010); values equal to or higher than 0.90 are considered a good fit of the theoretical model (Byrne, 2006). For RMSEA, values below 0.08 are acceptable (Hair et al., 2010). See Table 2.



Table 2. CB-SEM results or internal consistency and convergent validity of latent variables in the theoretical model for DMMI and SIS

Id	Theoretical Model Consistency and Convergent Validity						Theoretical Model Discriminant Validity									
	Variable	Load Factor	Robust t Value	Cronbach's Alpha (>=0.7)	CRI (>=0.7)	AVE (>=0.5)	MVS	VAL	MKT	GST	STG	TAC	DMT	PLN	PER	PRO
1	MVS	0.785***	1.000a	0.639	0.736	0.518	0.518	0.32-0.43	0.5-0.67	0.34-0.45	0.27-0.48	0.38-0.56	0.67-0.79	0.45-0.57	0.48-0.67	0.44-0.65
2	VAL	0.821***	6.876	0.877	0.798	0.657	0.679	0.657	0.35-0.76	0.39-0.58	0.34-0.59	0.21-0.45	0.38-0.55	0.56-0.67	0.71-0.82	0.65-0.78
3	MKT	0.993***	5.682	0.783	0.795	0.589	0.559	0.591	0.589	0.49-0.66	0.56-0.78	0.23-0.35	0.17-0.28	0.36-0.45	0.28-0.45	0.33-0.67
4	GST	0.756***	10.112	0.765	0.788	0.726	0.622	0.776	0.718	0.726	0.56-0.8	0.71-0.8	0.67-0.72	0.52-0.67	0.68-0.75	0.71-0.81
5	STG	0.850***	9.841	0.789	0.801	0.670	0.794	0.673	0.869	0.713	0.670	0.45-0.61	0.21-0.43	0.65-0.73	0.76-0.89	0.56-0.78
6	TAC	0.810***	7.422	0.767	0.778	0.796	0.824	0.776	0.658	0.613	0.810	0.796	0.13-0.28	0.27-0.35	0.37-0.56	0.65-0.82
7	DMT	0.926***	12.587	0.865	0.895	0.577	0.881	0.791	0.813	0.697	0.624	0.890	0.577	0.36-0.56	0.22-0.45	0.42-0.57
8	PLN	0.891***	5.876	0.812	0.827	0.692	0.759	0.867	0.682	0.730	0.821	0.857	0.687	0.692	0.65-0.77	0.66-0.82
9	PER	0.694***	7.871	0.765	0.770	0.786	0.765	0.775	0.651	0.566	0.689	0.578	0.651	0.881	0.786	0.34-0.56
10	PRO	0.707***	8.876	0.751	0.759	0.671	0.678	0.654	0.609	0.678	0.873	0.651	0.871	0.778	0.765	0.671

Source: Own, using EQS 6.2

The CB-SEM results are depicted in Table 2 indicating that the model offers a good fit to the data as follows: S-B  $\chi^2$  . 917.022; df=204; p<0.005; NFI=0.828; NNFI=0.801; CFI=0.871; RMSEA=0.081. CRI and Cronbach’s alpha higher than 0.70 suggested by Nunnally & Bernstein (1994); for each pair of constructs, the value of Average Variance Extracted (AVE) was calculated with results higher than 0.50 (Fornell & Larcker, 1981). For CB-SEM items, factor-related are significant (p <0.001), and the results pointed out as convergent validity. The values of all the load factors are higher than 0.60 (Bagozzi & Yi, 1988).

## DISCUSSION

The unusual appearance of COVID-19 as an emergency context and the next normal have brought essential changes in the SIS behavior from emerging countries like Mexico to define new strategies in the digital marketing field and facing the loss of economic growth levels of the SIS. As a result of this study, we argue that DMMI fulfills the digital marketing strategists’ requirements to design a digital campaign in their operations, income, and competitiveness in the post-Covid era. These DMMI variables are Mission-Vision (MVS), Value Proposition (VAL), Market (MKT), Goal Settings (GST), Strategy (STG), Tactics (TAC), Digital Marketing Tools (DMT), Planning (PLN), Performance (PER) and Profitability (PRO). Here, we expose that the DMMI empirical model able has important contributions:

First, it determines the crucial role of MVS, VAL, MKT, GST, STG, TAC, DMT, PLN, PER, and PRO called here DMMI when these variables are related.

Second, we determined how interacting such variables according to the SIS in post-Covid era in Mexico elicit digital marketing strategies in designing a digital campaign to recover for the SIS operations, income, and competitiveness.

## **Theoretical Implications**

This paper contributes to the knowledge based on the Digital Marketing Model innovation (DMMI) proposal describing the underlying variables for the design that elicit digital marketing strategies for social impact startup (SIS) in the next normal. The model has been proved empirically in several stages.

**Stage 1** (or Pre-Covid Era). It implied a previous qualitative study (Jan-Apr 2017) based on a literature review involving consistent research on DMMI. The configurational approach enables the understanding to detect factors, variables, and indicators as a set of components to serve a conceptual model empirically proved.

The literature review results were compared by three SIS professors (academic vision) and three CEOs leading SIS as specialists (expert vision). Through the Delphi Panel focus group and AHP, there were detected, finally, ten variables: Mission-Vision (MVS), Value Proposition (VAL), Market (MKT), Goal Settings (GST), Strategy (STG), Tactics (TAC), Digital Marketing Tools (DMT), Planning (PLN), Performance (PER) and Profitability (PRO). A questionnaire was designed as a final result (see Table 1).

This stage finally proved the model's reliability through multiple linear regression and correlation quantitative techniques on survey questionnaires over 400 subjects (200 CEO digital marketing experts, 100 consultants, and 100 academics).

**Stage 2** (or Post-Covid Era) The procedure to prove the DMMI's validity implied a final questionnaire survey applied between Dec-2020-Feb 2021 over 180 social impact startups CEOs' intervention (expert vision) in the relationship of the model's ten variables under the CB-SEM based on EQS 6.2. Furthermore, determine the digital marketing strategies as the final result in post-Covid Mexico's era.

The CB-SEM load factor results of the social impact startup (SIS) (see Table 2) highlight the importance of the sublayer variables on DMMI. The results, according to the load factor magnitude per variable and the most relevant indicators, allow us to see the following digital marketing strategies as a post-Covid era:

1. **Market (MKT, 0.993).** This is the most relevant variable for the SIS. The SIS is trading all about the market segmentation as a target. It comprises the heart of any business model. Without a (profitable) market, no company can survive for long. To better satisfy the market, the SIS group them into distinct segments with common needs, common behaviors, or other attributes. The SIS aims to define specific market segmentation as a target to be attended for their digital campaign to raise their competitiveness.
2. **Digital Marketing Tools (DMT, 0.926).** The SIS is in constant surveillance to determine what digital marketing tools are ready to use in the digital campaign design for competitiveness. The first results under "*touchless, cashless and hygiene*" in the post-Covid era pointed out about digital marketing tools, in descending category the uses of APPs; Mobile Marketing; Search Engine Optimization (SEO); Search Engine Marketing (SEM); Social Media Marketing; Augmented Reality; Virtual Reality; Wearable Marketing; Social CRM; Affiliate and Partner Marketing; Online advertising; Online Public Relations; Home & Site-Wide Page Effectiveness; Landing Page Design Effectiveness; Search and Browse Page Efficiencies; Category and Product Page Efficiencies; Basket and Checkout Efficiency; Social Commerce; Content Marketing; Newsletters; eMail marketing; e-Contact Strategy; Customer and Service Support.
3. **Planning (PLN, 0.891).** The SIS, in this step, gathers all the digital marketing tools and techniques of the tactics is programmed logistically, to be implemented in practice as a strategy for digital

marketing. The strategy is defined to integrate communications across different customer touch-points. The planning involves setting goals, creating a coherent strategy to achieve them, and evaluating evaluation tools. This means the SIS design a strong program with a schedule and times to implement the digital marketing tools in order to obtain results in the digital campaign design for competitiveness.

4. Strategy (STG, 0.85). The SIS in this stage represents the “*how to do*” to achieve the goal settings (GST) in descending order for post-Covid era:
  - a. Engagement & Loyalty. Capture and retention as a growth strategy to build customer and fan relationships to encourage repeat visits and sales.
  - b. Awareness. Acquisition strategy to build awareness off-site and in offline media to drive to web presences.
  - c. Effectiveness on Call to Action. Conversion strategy to achieve marketing goals of leads & sales on web presences and offline.
  - d. Desire & Experience. Strategy based on the sample and testing of a service or a product, with a novelty presentation, increases the acquired sensations and emotions.
5. Value Proposition (VAL, 0.821). It is why customers turn to one company over another solving their problems or satisfying their needs. It consists of a selected bundle of products or services that cater to specific customer segmentation requirements. In this sense, it is an aggregation, or bundle, of benefits that a company offer customers. The SIS identifies and applies the value proposition in the digital campaign design for competitiveness.
6. Tactics (TAC, 0.81). This represents all the activities to be implemented to follow the strategies, involving mainly the use of the digital marketing tools (DMT). See Table 3.

*Table 3. Digital marketing tools vs. strategy*

	Strategy			
	Awareness	Engagement & Loyalty	Desire & Experience	Effectiveness on Call to Action
<b>D M T</b>	SEO/SEM	Content Marketing	Augmented Reality	Home & Site-Wide Page
	Affiliate & Partner Marketing	Newsletters & eMail Marketing	Virtual Reality	Landing page design
	On line Advertising	e-Contact Strategy	Wearable Marketing	Search and Browse Page
	On line PR	Customer Service & Support		Basket and Checkout
	Social Media	Mobile Marketing		Social Commerce
		Social CRM		
		Blogging		

Source: Mejía-Trejo (2018)

The SIS considers the use of Digital Marketing Tools (DMT) for each strategy in the digital campaign for competitiveness, such as:-Awareness (SEO/SEM; Affiliate & Partner

Marketing; On line Advertising; On line PR; Social Media)-Engagement & Loyalty (Content Marketing; Newsletters & eMail Marketing; e-Contact Strategy; Customer service & support; Mobile Mar-

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keting; Social CRM; Blogging)-Desire & Experience (Augmented Reality; Virtual Reality, Wearable Marketing)-Effectiveness on Call to Action (Home & Site-Wide Page; Landing page design; Search and Browse Page; Basket and Checkout; Social Commerce

7. Mission-Vision (MVS, 0.785). The mission is a written declaration of an organization's core purpose and focuses that normally remains unchanged over time. It is the cause of the firm's campaign, day-to-day operational objectives. The vision is the effect of the firm's campaign. It expresses the high-level goals for the future. The **SIS** considers the mission and vision involved in the digital campaign for competitiveness and also considers the trademark as a strategic asset to be used in the digital campaign design for competitiveness
8. Goal Settings (GST, 0.756). All digital marketing campaign requires objectives to be reached, in descending order, for post-Covid era: The sales; The branding positioning; The number (real & potential) of customers database; The product & services (current and new ones) information.
9. Profitability (PRO, 0.707). It is expressed in terms of return on investment (**ROI**). It is about how the digital campaign is working in the short, medium, or long term. The **SIS** permanently makes profitability analysis to determine the digital campaign's current profitability for competitiveness in real-time.
10. Performance (PER, 0.694). It implies knowing how well the digital campaign is working. Practically, it involves the measurement and assessment of all the previous stages. Its support is the web analytics to obtain full control of the digital campaign. he **SIS** establishes the key performance indicators (**KPIs**) for performance monitoring to determine the digital campaign's current performance for competitiveness in real-time. Here they are using the web analytics digital marketing tools.

## Practical Implications

The creation of new SIS, particularly those that use technology and sustainable tenets, like the 17 sustainable development goals (UN 2015) based on their products or services, generates competitiveness and economic growth (Matson, 2006). The social impact startups fail so badly everywhere we look due to several causes, mainly the allure of a good plan, a solid strategy, and thorough market research (Ries, 2011). Due to the uncertainty, all of them must be judiciously analyzed and quickly applied (Ries, 2011; Pomerol, 2018). In an emergency context (like the Covid-19 pandemic and the next normal), the uncertainty boost for social impact startups creation and development: "*startups increase uncertainty and uncertainty encourages people to feed the process of startup creation.*" (Pomerol, 2018). Success is not delivering a feature; success is learning how to solve the customer's problem (Valencia, 2014).

The research findings provide useful implications for academics, digital marketing innovation managers, and professional practitioners of innovation activities about the relationship of DMMI to design digital marketing strategies for the next normal in Mexico. The DMMI proved its model's validity based on CB-SEM assessment and empirically provides new insights on how the combinations of the variables: Mission-Vision (MVS), Value Proposition (VAL), Market (MKT), Goal Settings (GST), Strategy (STG), Tactics (TAC), Digital Marketing Tools (DMT), Planning (PLN), Performance (PER) and Profitability (PRO) create digital marketing strategies for the SIS in the next normal in Mexico and other several emergent countries.

## CONCLUSION

This study verifies how events like the Covid-19 pandemic and the next normal are considered emergency context by 180 social impact startups (SIS) survivors in Mexico (an emergent country), in the scenario of Dec-2020 to Feb-2021. The Covid-19 has elicited economic, employment ravages with missing employment, competitiveness, productivity, and worse yet, the loss of the SIS itself.

Digital marketing campaigns are alternatives for the Mexican SIS to raise its competitiveness again. Therefore, as theoretical implication for academics considering all mentioned above, we started a study to validate the underlying factors, variables, and indicators of a previous digital marketing innovation model (DMMI) to be applied to the Mexican SIS to obtain digital marketing strategies for the next normal and proved to be a solid model with high values of consistency, convergent and discriminant based on CB-SEM.

Finally, the practical results are helpful for professionals and consultants to design permanent digital marketing innovations to be adopted by the SIS economically affected in the next normal or post-Covid era in Mexico. The results suggest a permanent revision of the segmented market (MKT), with a wide use of digital marketing tools (DMT) to apply a digital campaign design for competitiveness. The first results under “*touchless, cashless and hygiene*” in the post-Covid era pointed out about the use of digital marketing tools, mainly based on APPs; Mobile Marketing; Search Engine Optimization (SEO); Search Engine Marketing (SEM); Social Media Marketing; Augmented Reality; Virtual Reality; Wearable Marketing; Social CRM, amongst other options. The planning (PLN) involves setting goals, creating a coherent strategy to achieve them, and evaluating evaluation tools. The planning generates the strategy (STG), and it represents the “*how to do,*” the goal settings (GST) in descending order for post-Covid era: engagement & loyalty; awareness; effectiveness on call to action and desire & experience.

The SIS promotes the update of their value proposition (VAL) to highlight in the digital marketing campaign and define the tactics (TAC) to be implemented. In this case, mainly the use of

Digital Marketing Tools such as:-Awareness (SEO/SEM; Affiliate & Partner Marketing; On line Advertising; On line PR; Social Media)-Engagement & Loyalty (Content Marketing; Newsletters & eMail Marketing.

The Mission and Vision (MVS) reinforce the goal settings (GST) aimed at sales and branding positioning. Profitability (PRO) and performance (PER) are the last underlying variables reviewed in real-time by the SIS, when they are activated by the use of web analytics tools to make decisions.

## LIMITATIONS AND FUTURE STUDIES

All empirical studies have some limitations:

1. One of them is the industry and the social impact startups sectors as sources of information. Not all of them are accessible to provide information under equal conditions and times.
2. The results consisted of a questionnaire survey of self-reported data to remind their perceptions. Further studies could combine this questionnaire with survey data from direct semi-structured interviews and direct observations of specific social impact startups (SIS) from other emergent countries.

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3. Future investigations may also include other different factors, variables, or indicators. This would be very useful to complement the digital marketing model innovation (DMMI) to design digital marketing campaign strategies for the next normal in other social impact startups and environments that could offer more helpful information.

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## **KEY TERMS AND DEFINITIONS:**

**Startup company:** Business model based on innovation and technology.

**DMMI:** It is a model that describes and identifies all the variables and indicators involved in designing and driving a digital marketing campaign.

**Digital Marketing Tools (DMT):** Software to organise and develop digital marketing strategies.



## Chapter 10

# Do Spanish Family SMEs Make Appropriate Use of Their Organizational Websites? An Analysis of Family Firms' Brand Promotion and Website Quality Level

**Rubén Martínez-Alonso**

 <https://orcid.org/0000-0001-7389-762X>

*University of Almería, Spain*

**María J. Martínez-Romero**

 <https://orcid.org/0000-0001-7891-1558>

*University of Almería, Spain*

**Daniel Rodríguez-Rodríguez**

*University of Almería, Spain*

### ABSTRACT

*The aim of this chapter is to analyse how family SMEs use digital media, particularly organizational websites, to disseminate information about their products, services, history, etc. To this end, the authors perform a descriptive analysis of 32 organizational websites from privately owned family SMEs located in the region of Andalusia (Southern Spain), emphasizing two differentiating strategies: promotion of the family firm brand and website quality level. On the one hand, the findings show that family firms are to some degree reluctant to promote their family firm brand on their organizational websites, with the indicator of being a family firm as the most communicated. On the other hand, the findings reveal that family firms tend to develop organizational websites with an adequate quality level; however, the inclusion of components, such as FAQ or help sections or a bilingual option, need to be considered in the future.*

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## INTRODUCTION

In recent decades, the continuous renewal of digital media, such as organizational websites or social networks, as well as the emergence of new information and communication technologies, have completely revolutionized the business world (Alves et al., 2020; Gruner & Power, 2018). Furthermore, family firms represent a form of organisation that has been attracting significant attention from scholars and practitioners in global markets (De Massis et al., 2018). This increased interest is not surprising given that family firms, defined as those businesses ‘dominantly controlled by a family with the vision to potentially sustain family control across generations’ (Zellweger, 2017, p. 22), have become the backbone of the majority of the world’s economies by generating around 70–90% of annual global GDP and creating approximately 50–80% of employment in most countries worldwide (Casado-Belmonte et al., 2021; IEF & Red de Cátedras de Empresa Familiar, 2018; Martínez-Alonso et al., 2020a).

Extant literature on this theme points to the rise of digital media as one of the possible factors that has enabled family firms to gain considerable momentum within the business sphere (Zanon et al., 2019). The application of digital media has contributed to making work more efficient and easier, improving the image and reputation of family firms, as well as increasing their firm profitability (Gallucci et al., 2015; Sageder et al., 2018). Nevertheless, the incorporation of these digital media in the context of family firms has also provoked heated debates among family firm owners and managers (e.g., Barroso-Martínez et al., 2019). On the one hand, some family firm owners and managers consider that digital media allows them to establish differentiation strategies and even reach broader markets (Binz Astrachan & Botero, 2018). On the other hand, certain family firm owners and managers question the utility of these digital media for their organizations, as they believe that instead of ensuring control of the firm and guaranteeing its subsistence, digital media might bring negative consequences for the business family (Treem Jeffrey & Leonardi, 2012).

In order to shed new light on this debate, this chapter aims to conduct a descriptive analysis of the use and dissemination of information through organizational websites by family firms. To do so, this study focuses on examining the promotion of family firm brand and website quality level. First, the promotion of family firm brand, conceived as the action through which a family firm promotes its family status as part of its communication strategy (Binz Astrachan & Astrachan, 2015), is an emerging issue on which empirical work is still lacking (Botero et al., 2013; Leonardi & Vaast, 2017). Therefore, in an attempt to deepen in the promotion of family firm brand, this chapter will examine the following indicators in family SMEs’ organizational websites (Barroso-Martínez et al., 2019): being a family firm, ownership level, presence of family members in top management teams, family history, generation in control, and family name as part of the firm name. Second, website quality level is also a topic of growing debate, as having a website with a certain degree of quality could be very beneficial to offer a better image to the market and the competition (Krappe et al., 2011; Sageder et al., 2018). In this regard, and to get further insights on the website quality level of the analysed firms, this chapter will assess such quality through four areas (Cober et al., 2004): content, form, functionality, and connectivity to social networks.

To develop the descriptive analysis, a sample of 32 organizational websites from privately owned family SMEs located in the region of Andalusia (Southern Spain) is used. Regarding the promotion of family firm brand, the results show that less than 50% of the sampled firms communicate their family status on their organizational website. The findings reveal that there are family firm owners and managers who do not consider the inclusion of their family firm brand in their communication campaigns as a differentiating strategy. This is quite surprising, insofar as recent research has shown that promoting

family firm brand leads to very positive consequences for family firms (e.g., Binz Astrachan & Botero, 2018). Therefore, it is likely that family firm owners and managers consider that mixing family and business is not entirely positive when it comes to the image they want to offer to their customers and the rest of stakeholders. Concerning the website quality level, the findings reveal an increasing trend on the part of family SMEs to offer easy and intuitive organizational websites. Nevertheless, there is one area, i.e., connectivity to social networks, which is barely used, but that will be increasingly crucial whether family firms want to establish quality, long-lasting relationships with their customers and other stakeholders (Berrone et al., 2012; Miller & Le-Breton-Miller, 2005), and thus increase the likelihood of success in achieving better performance outcomes (Gallucci et al., 2015).

In this light, this study offers important contributions to existing literature, as well as interesting implications for practitioners. First of all, this study contributes to the literature of digital media, and specifically, organizational websites within the family firm research field. In this regard, we answer the call for studies investigating family firms' communication strategies through their organizational websites (Barroso-Martínez et al., 2019; Binz Astrachan et al., 2018; Botero et al., 2013). Namely, this chapter focuses on two indicators, i.e., family firm brand and website quality level, which have been underexplored so far in privately owned family SMEs. Second, this chapter extends prior research regarding the communication practices through organizational websites in family firms (Botero et al., 2013), which are known to influence stakeholders' perceptions and attitudes towards firms (Cheney, 1991). Finally, inasmuch as a sample composed exclusively of family firms is analysed, this study deals with the trendy issue of family firm heterogeneity (Chua et al., 2012) with regards to website promotion policies. Regarding the implications for practitioners, the present study could be very useful for family firm decision makers, who should contemplate the possibility of enhancing the family firm brand and the quality level in the organizational websites to improve their firms' outcomes.

This chapter has the following structure: first, it conceptualizes and explains the promotion of family firm brand on the family firms' organizational websites and their quality level. Next, the methodology is presented, and then, the results are shown and discussed. Finally, the chapter ends with the conclusion.

## **STUDY OF FAMILY FIRMS' ORGANIZATIONAL WEBSITES: PROMOTION OF THE FAMILY FIRM BRAND AND WEBSITE QUALITY LEVEL**

### **Concept of Family Firm Brand**

Family firm brand is often conceptualized as a policy by which the family firm promotes its family status (Barroso-Martínez et al., 2019; Binz Astrachan & Astrachan, 2015). Previous studies show that communicating the family firm brand as part of corporate communication activities can lead to positive perceptions of the family firm (i.e., benevolence, responsible behaviour, authenticity) and increased intentions to purchase from such family firm (Beck & Prügl, 2018; Binz et al., 2013). In addition, some scholars indicate that the communication of the family firm brand can exert an impact on firm performance factors (Gallucci et al., 2015; Zellweger et al., 2012). Despite these benefits, prior research has found that family firms greatly differ in the way in which they use their family firm brand as part of their communication effort (Botero et al., 2013). Specifically, previous studies reveal that not all family firm owners and managers agree that family firm brand would be the best formula for the growth of their firms (Barroso-Martínez et al., 2019).

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According to Binz Astrachan & Botero (2018), there are two types of factors by which family firms may decide to communicate their family status: those driven by the firm's own identity and those prompted by the firm's expectations. Regarding the first factors, organizational identity theory suggests that family firms differ in their proclivity to actively promote their family background. Depending on the degree of identification and commitment of family members to their firm, their involvement in the creation and promotion of their family firm brand will be encouraged to a greater or lesser extent (Memili et al., 2010; Zellweger et al., 2010). In relation to the second factors, it is evidenced that some family firms choose to communicate their family background because they consider that being a family firm will act as a differentiating resource, thus bringing positive consequences for the organization (Binz Astrachan & Botero, 2018).

### **Indicators of Family Firm Brand**

The family firm brand can be communicated through direct channels, such as advertisements, or through indirect channels, like external representatives (Botero et al., 2013). Normally, direct channels are preferred, as they allow family firms to control the type of information to be presented to the different stakeholders (Barroso-Martínez et al., 2019; Botero et al., 2013). One of the most important direct channels to communicate the family firm brand nowadays is the organizational website (Braddy et al., 2008; Schlosser et al., 2006). Thus, this study is focused on the communication of the family firm brand through organizational websites. According to Barroso-Martínez et al. (2019) and Binz Astrachan et al. (2018), family firms' organizational websites should contain information related to the following indicators to properly communicate the family firm brand:

- *Being a family firm*: the recognition of the family firm status must appear on the organizational website. An example would be: "Cuadraspania is a family firm established in Almería 30 years ago...".
- *Ownership level*: it relates to the percentage of ownership that the family or family members have in the family firm, a condition that should appear on the organizational website. An example would be: "At Cuadraspania, the firm is 100% owned by members of our family...".
- *Presence of family members in top management teams*: it refers to the occupation by family members of management positions. An example would be: "Cuadraspania's top management team is composed of Joséphine Cuadras as Chief Executive Officer, Antoine Cuadras as Chief Operating Officer...".
- *Family history*: it relates to the creation of the family firm and its history since then. An example would be: "Jean Cuadras created the firm in 1990, with the objective of...".
- *Generation in control*: it refers to the number of generations that have led the family firm, and more specifically, the generation that currently leads the family firm. An example would be: "The second generation of the Cuadras family is the one that currently leads Cuadraspania...".
- *Family name as part of the firm name*: it indicates that the family name is part of the firm name. An example would be: "In honour of our family name, our firm was given the name Cuadraspania...".

## **Concept of Website Quality Level**

Website quality level refers to the degree of usability of organizational websites by customers and other stakeholders (Barroso-Martínez et al., 2019). The website quality makes a website profitable, user friendly and accessible, by offering useful and reliable information and by providing good design and visual appearance to meet the users' needs and expectations (Anusha, 2014).

Despite the current relevance of website quality, this concept is still vastly undefined (Semerádová & Weinlich, 2020). Indeed, several definitions have been used during the last decade to clarify the website quality term (e.g. Hasan & Abuelrub, 2011; Rocha, 2012). Finally, last year, Morales-Vargas et al. (2020, p. 2) proposed the following formal definition, *website quality can be considered the ability of a website to meet the expectations of its users and owners, as determined by a set of measurable attributes*.

The firms' goal is to create a secure, useful, accessible and ultimately beneficial organizational website (Signore, 2005). It is very important for firms to take care of the quality issue, as it can be extremely valuable for coping with the market and the competition, as well as for providing both good public image and reputation (Krappe et al., 2011; Sageder et al., 2018).

Since the beginning of the current century, the number of firms with website has increased exponentially (Fernández-Uclés et al., 2020; Marín Dueñas & Lasso de la Vega González, 2017). It is evident that not all organizational websites are structured in the same way. Indeed, each firm provides information in a different manner, but the quality level of such websites is a key issue to be considered. The following section discusses in depth the areas and components that determine the quality level of organizational websites.

## **Areas and Components of Website Quality Level**

Following the proposals of Cober et al. (2004) and Barroso-Martínez et al. (2019), four main areas are identified when analysing the website quality level: content, form, functionality and connectivity to social networks. These areas, in turn, are divided into a total of 37 components, which are detailed as follows.

### **Content**

The *content* area refers to the amount and type of information included in the organizational website. This area is of utmost importance because it entails the main structure of the website, through which to search and research in it. In addition, a good, high quality content will have a greater influence on customers and other stakeholders (Keller & Block, 1997; Kivetz & Simonson, 2000). The ten most notable components that any organizational website should include in this area are:

- About us section
- Blog
- Newsletter
- Copyright
- Legal disclaimer
- FAQ/Help
- News
- Privacy policy

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- Trust mark/Trust seal
- Terms of use

### **Form**

The *form* area concerns the way in which information is presented on the organizational website. As suggested by certain authors, if the information is presented in an attractive and evocative way, it can lead to a higher firm profitability (Cyr, 2008; Keller & Block, 1997). The six components included in this area are:

- Animation
- Colour background
- Pictures
- Colour photographs
- Colour text
- Video

### **Functionality**

The *functionality* area refers to the ease of navigating through the organizational website, as well as interacting and establishing communications with the firm (Barroso-Martínez et al. 2019). Thus, functionality can be delineated along a number of variables, like the extent to which a site is navigable, playful and instrumental (Cober et al., 2004). The twelve fundamental components in this area are:

- Search function
- E-mail option
- Fax Information
- Postal address
- Telephone
- Last update
- Forums
- Languages
- Site map
- Navigation menu
- Register
- RSS

### **Connectivity to Social Networks**

The *connectivity to social networks* area relates to the presence of the firms' social networks on the organizational website (Barroso-Martínez et al., 2019; Cober et al., 2004). This area is gaining increasing importance nowadays, as more and more firms are expanding their online structure through these tools, being aware of the social and economic benefits that social networks can bring to them. This area includes the following nine social networks as components:

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- Facebook
- Flickr
- Connection to Google +
- Instagram
- LinkedIn
- Tumblr
- Twitter
- Weibo
- YouTube

## **METHODOLOGY**

### **Sample**

We decided to analyse the organizational websites of a sample of 45 privately owned family SMEs located in the region of Andalusia (Southern Spain). The data were derived from a wider study analysing general characteristics of a representative sample of Andalusian family owned firms (Rojo-Ramírez et al., 2015). The study of family firms in the region of Andalusia is of great importance, inasmuch as these businesses generate 78% of the GDP in such region and 57% in Spain as a whole (AAEF, 2021).

The family nature of privately owned SMEs was determined following the proposal of Diéguez-Soto et al. (2015), which has been applied in many studies to identify and classify family firms (López-Delgado & Diéguez-Soto, 2015; Martínez-Romero et al., 2020b; Rojo-Ramírez & Martínez-Romero, 2018). Diéguez-Soto and colleagues, to differentiate between family and non-family firms, took as reference the involvement approach (Chrisman et al., 2005) that considers both family control and family involvement enough to consider a firm a family firm. Moreover, the abovementioned authors, as well as other authors using this approach to identify family firms (Gómez-Mejía et al., 2001; Martínez-Romero & Rojo-Ramírez, 2017; Rojo-Ramírez et al., 2011), took advantage of the Spanish conventional practice of giving children two surnames, one from each parent. These authors develop a comparison among the surnames of all internal firms' stakeholders involved in the management and governance of the firm (CEO, managers and shareholders). Depending on the match between the surnames, firms were classified as family or as non-family firms. Accordingly, based on the SABI<sup>1</sup> (Sistema de Análisis de Balances Ibéricos) database, we proceed similarly to Diéguez-Soto et al. (2015) to identify family firms.

### **Analytical Procedure**

As previously mentioned, within the field of digital media, this study focuses on the analysis of organizational websites. For this reason, the initial sample of 45 family SMEs was reduced to 32, due to the non-existence of organizational websites in the case of 13 family firms. According to the number of employees, the sample is composed of 20 small-sized firms (10-49 employees) (62.50%), and 12 medium-sized firms (50-249 employees) (37.50%). In terms of industry, the sample firms pertain respectively, to the agriculture (15.63%), manufacturing (21.88%), commerce (50.00%) and services (12.50%) sectors. The analytical procedure applied consisted of an internet manual search for each of these family SMEs to verify whether they had an organizational website. The data were collected in September 2019. Af-

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ter identifying those family firms with organizational website, we proceeded to examine the two main aspects proposed in this research: the promotion of family firm brand and the website quality level. To do so, a set of variables have been created to assess the proposed strategies, which are explained in the following section.

### **Measures**

#### **Promotion of Family Firm Brand**

The information to evaluate the promotion of family firm brand was obtained through an exhaustive analysis of the organizational website of each of the firms in the study sample. For this purpose, a set of six variables was built to determine the existence or not of the abovementioned indicators, representative of the family firm status, in each organizational website (e.g., Barroso-Martínez et al., 2019). Specifically, all these variables were coded with the value 1 if the indicators were present on a family firm's organizational website, and 0 otherwise.

#### **Website Quality Level**

Similarly to the promotion of family firm brand, the required information to assess the website quality level was collected through a comprehensive review of the family firms' organizational websites (e.g., Barroso-Martínez et al., 2019). In this regard, a total of 37 variables representing those components related to the areas of content, form, functionality and connectivity to social networks were created. Particularly, all these variables were coded with the value 1 if the components were present on a family firm's organizational website, and 0 otherwise.

## **RESULTS**

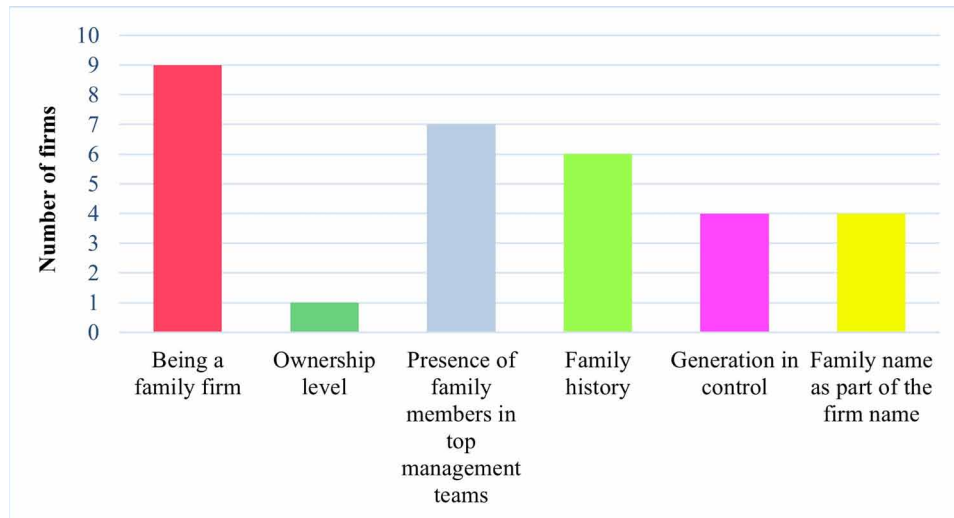
After describing the methodology utilized, this section shows the obtained results. First, we present the results related to the promotion of family firm brand on the sampled family SMEs' organizational websites. Figure 1 shows that the most common component appearing on organizational websites is the one that explicitly indicates that the firm is a family firm, that is, *being a family firm*. A total of nine family firms in the sample carry out this action. Nevertheless, most family firms, despite indicating their family status, do not provide information on their *ownership level*. In fact, only one family firm reports the *ownership level* (in percentage) on its organizational website. On the other hand, it has not been possible to gather much information on other family firm brand indicators, such as the *presence of family members in top management teams*, nor on *family history*. Although they represent the second and third most frequent indicators, they are only reported by seven and six family firms, respectively.

Additionally, very few family firms provide information on the *generation in control* of the firm and on the use of the *family name as part of the firm name*. This is because if there were any kind of problem, such problem will be automatically associated with the family, and this would make the family to incur an enormous responsibility for their actions on an ongoing basis. Thereby, many family firm owners and managers do not want to take this risk (Binz Astrachan & Botero, 2018), and try to avoid merging the family name with the firm name.



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Figure 1. Number of firms including each family firm brand component on their organizational websites  
Source: Own elaboration



Second, we show the obtained results regarding the website quality level of the sampled firms. Figure 2 illustrates the components of the *content* area and the number of firms using each of them. Family firms are revealed to attach great importance to report certain components on their organizational websites, such as legal aspects (e.g., copyright, privacy policy, etc.), information about the firm or even to blogs and news. However, greater importance should be attached to the development of FAQ or help sections for customers and other stakeholders in the future, since, as shown in Figure 2, they are scarcely present on the analysed organizational websites.

Regarding the *form* area, Figure 3 shows the different components and the number of firms using each of them. In general terms, the form of family firms' organizational websites is quite attractive. Many of the family firms under study have organizational websites with lots of animation, colour and images. Nevertheless, there are not many family firms that include videos on their organizational websites.

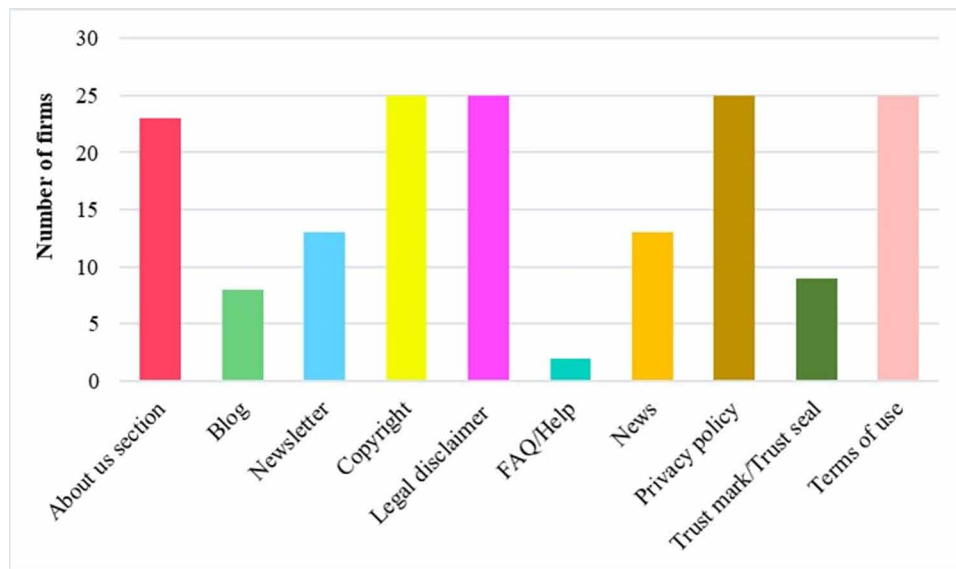
The *functionality* area and its corresponding results are shown in Figure 4. It is revealed that family firms tend to provide their contact (e.g., telephone, e-mail, fax...), and location data (e.g., site map, postal address...). All this is essential to contact and/or locate the family firm. On the other hand, very few family firms' organizational websites are available in more than one language, an aspect that, if utilized, would make these websites more attractive and useful (as well as enabling family firms to reach a wider market). Finally, it should also be noted that few family firms' organizational websites have been found to include search functions, which makes it rather difficult to look for specific issues within them.

Figure 5 shows the results regarding the *connectivity to social networks* area. This analysis reveals that the most included social network in family firms' organizational websites is Facebook. This can be explained by the fact that Facebook is one of the most widely used social networks worldwide by institutions, governments and businesses, as Facebook allows to interact directly with all the individuals (Haro-de-Rosario et al., 2017; Ji et al., 2017). The second and third most popular social networks on family firms' organizational websites are LinkedIn and YouTube. Family firm owners and managers also embrace these social networks because they allow them to generate, disseminate, and exchange information about their products, services, or history with different online communities (e.g., profes-

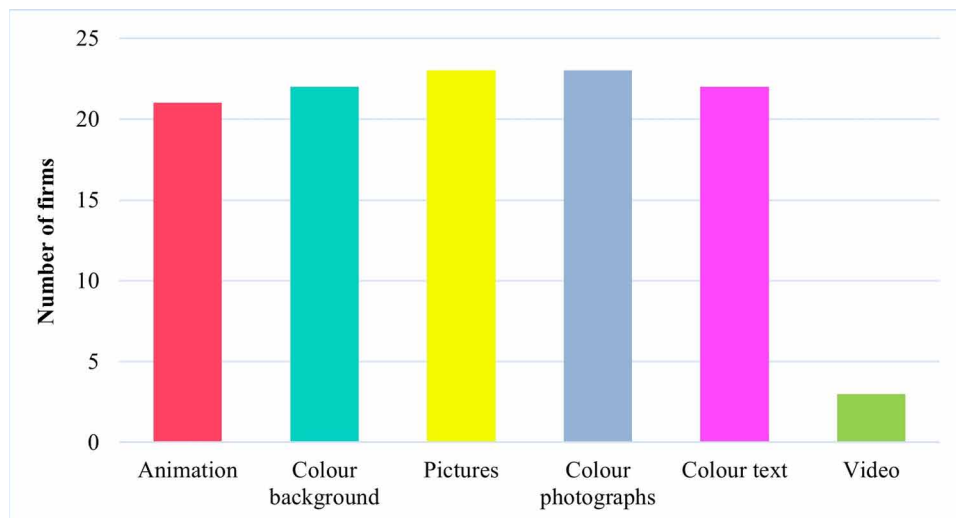
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sionals, customers, supporters, employees or funders) in an efficient and economical way (Mumi et al., 2019; Sullivan & Bendell, 2020). Other social networks used by the sampled firms to a lesser extent are Instagram and Twitter. Despite the above, very few family firms have been found to include their social networks on their organizational websites, which can become a competitive disadvantage, due to the increasingly digital nature of today’s firms.

*Figure 2. Number of firms including each component of the content area on their organizational websites*  
 Source: own elaboration



*Figure 3. Number of firms including each component of the form area on their organizational websites*  
 Source: Own elaboration



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Figure 4. Number of firms including each component of the functionality area on their organizational websites

Source: own elaboration

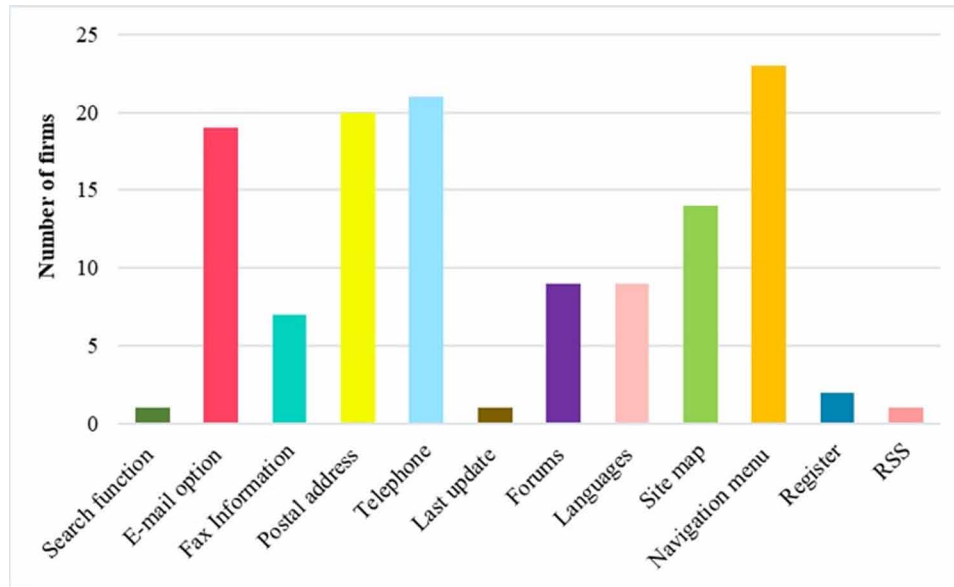
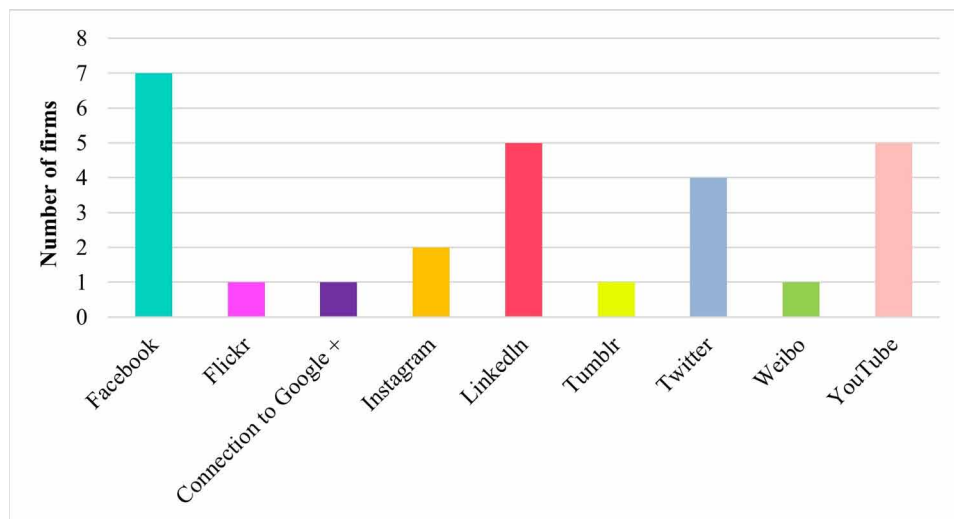


Figure 5. Number of firms including each component of the connectivity to social networks area on their organizational websites

Source: own elaboration



## **DISCUSSION AND CONCLUSION**

The last years have witnessed the continuous and exponential growth that family firms have experienced, becoming one of the fundamental pillars of most of the world's economies (Casado-Belmonte et al., 2021; Martínez-Alonso et al., 2020a; Martínez-Romero, 2018). These businesses have consolidated their position in global markets, evolving from being organisations created by a family with the purpose to ensure their survival over the years, to being potential drivers of any country's economy and employment (IEF & Red de Cátedras de Empresa Familiar, 2018; Martínez-Romero et al., 2019). Part of family firms' growth has been due to the emergence of digital media, that is, a set of tools such as organizational websites and social media, which have revolutionised the business world in the current century (Kaplan & Haenlein, 2010; Kietzmann et al., 2011; Tiago & Veríssimo, 2014). With these new digital tools, family firms have been able to make a significant leap in the markets, achieving a notable improvement in image and reputation (Alberghini et al., 2014; Sageder et al., 2018; Uyar et al., 2018). In addition, the use of these media has also enabled a significant increase in the economic and financial outcomes of such firms (Chukwujioke Agbimi, 2019; Gallucci et al., 2015).

Particularly, the aim of this chapter was to study the use of organizational websites, as well as the dissemination of information through them, within the family firm field, focusing on the examination of two differentiating strategies: the promotion of family firm brand and the website quality level. The empirical analysis was carried out using a sample of 32 organizational websites from privately owned family SMEs located in the region of Andalusia (Southern Spain). Regarding the promotion of family firm brand, the research findings reveal that there are family firm owners and managers who do not consider the inclusion of their family firm status in their marketing campaigns as a differentiating strategy. Nevertheless, there are also family firm owners and managers who believe that communicating such status could bring significant competitive advantages, as well as enhancing the family firms' image and reputation in the global market, and increasing the likelihood of successful firm growth (Barroso-Martínez et al., 2019; Binz Astrachan & Botero, 2018; Sageder et al., 2018). In this respect, and contrary to what might be expected, the empirical analysis reveals that only a small proportion of the sampled firms include the different indicators representative of family firm brand on their organizational websites, suggesting that this not a popular strategy for many family firms today. These findings are quite surprising, as recent studies have shown that the promotion of family firm brand leads to very beneficial consequences for family firms (Barroso-Martínez et al., 2019; Binz Astrachan & Botero, 2018).

Concerning the examination of the website quality level, the research findings show an increasing tendency in the part of family firms to enhance the quality level of their organizational websites. However, it has also been found that certain components, such as a FAQ or help section, a bilingual option, or the inclusion of firms' social networks on the website, are issues that family firms need to consider implementing on their websites in the future. In this regard, the development of a well-organised and attractive organizational website, with different options for individuals to choose from, and with great usability will be crucial if family firms want to establish quality, long-lasting relationships with their customers and other stakeholders (Berrone et al., 2012; Miller & Le-Breton-Miller, 2005), and therefore, achieve superior firm performance (Gallucci et al., 2015).

This chapter offers some very important contributions. First, it contributes to the literature of digital media in family firms, a topic that has been barely investigated so far (Barroso-Martínez et al., 2019; Binz Astrachan et al., 2018; Botero et al., 2013). Specifically, this chapter is focused on whether privately owned family SMEs make an appropriate use of their organizational websites, by examining the promo-

tion of family firm brand and the website quality level. In this regard, this is one of the pioneer studies exploring whether privately owned family SMEs communicate different family attributes through their organizational websites and the level of quality in those means of communications. Second, another contribution of this chapter is that it extends prior research regarding the communication practices of family firms (Botero et al., 2013). Family firms' communication practices are of utmost importance because they can influence stakeholder's perceptions concerning firms' principles, values, impressions, and practices, and consequently their attitudes towards firms (Cheney, 1991). Finally, as this chapter examines a sample of privately owned family SMEs, it highlights the existing family firm heterogeneity (Chua et al., 2012) with regards to their website promotion policies.

Additionally, this chapter has important implications for practitioners. To the extent that accurately communicating the family firm brand and having a high level of website quality have been shown to exert a positive impact on firm performance (e.g., Barroso-Martínez et al., 2019), family SMEs decision makers should further contemplate leveraging both their family firm brand and website quality, as part of marketing communication strategies towards stakeholders, in order to improve their performance outcomes. Moreover, the obtained findings can motivate managers of family SMEs or branding consultants to improve family members' participation in the development of appropriate organizational websites.

Despite the interesting results obtained, the present study has some limitations, which in turn give rise to fruitful lines of future research. First, the empirical study has been carried out with a sample of family SMEs located in the region of Andalusia (Southern Spain). Thus, future studies should be developed in other Spanish regions or even in other countries to test the validity and significance of our findings. Second, we analyse the promotion of family firm brand by focusing on only one communication channel, i.e., the organizational website. Given that the family firm brand can be communicated through multiple channels (Barroso-Martínez et al., 2019; Botero et al., 2013), future research should analyse how family firms communicate the family firm brand through interpersonal (i.e., sales representatives, point of sales interactions...) and other channels (i.e., advertisements, social media...) to extend the generalization of this chapter findings. Thirdly, more research is needed on the impact of organizational websites, and other media such as mobile applications and newsfeeds, on the marketing actions of family firms (Christofi et al., 2021). In this regard, very little is known about how family firms carry out their marketing plans, whether digital or offline. Therefore, addressing this issue is fundamental for this type of businesses to exploit their full marketing potential. Finally, it would be interesting that future studies analyse how the two strategies analysed, i.e., the promotion of family firm brand and the website quality level, by means of their indicators and components, affect other important aspects that are also acquiring great importance in the family firm field, such as such as innovation efficiency (Martínez-Alonso et al., 2020b), internationalization (Morales-López et al., 2019), value creation (Martínez-Romero et al., 2020a), sustainable performance (Martínez-Alonso et al., 2019), or entrepreneurial orientation (Hernández-Linares et al., 2020), among others.

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## KEY TERMS AND DEFINITIONS

**Andalusia:** It is a geographical region located in the southern of Spain. It is the most populated geographical region in Spain and the second in territorial extension.

**Communication Strategy:** It is a tool that helps firms align their general goals with a marketing plan focused on achieving a set of results.

**Customers:** Individuals or firms that purchase goods or services from other firms.

**Digital Media:** It refers to any form of media that can be created, viewed, modified, and distributed through electronic devices.

**Family Firm Heterogeneity:** Differences in the behaviours, objectives, and values of family firms due to high or low degree of family involvement in the firm.

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**Family Managers:** Family members of a family firm actively participating in the top management team.

**Family Owners:** Family members of a family firm participating in the firm's ownership.

**Firm Performance:** Economic outcomes obtained because of the interaction between firms' characteristics, actions, and environment.

**Organizational Website:** Websites whose purpose is to manage a firm presence on internet, facilitate information about the firm, display and sell their products or services, and serve as a means of communication with suppliers and customers, among other stakeholders.

### **ENDNOTE**

- <sup>1</sup> SABI is an economic and financial dataset, the data from which were compiled by Informa D&B in collaboration with Bureau Van Dijk, including financial statements, ratios, activities, shareholders of more than 2.600.000 Spanish and 800.000 Portuguese firms (January 2020).


# Chapter 11

## Adapting Digital Strategies to a New Era: A Delphi-Based Analysis in the Fashion Industry

**Rocío López Muniesa**

*Rey Juan Carlos University, Spain*

**Jose Ramón Saura**

 <https://orcid.org/0000-0002-9457-7745>

*Rey Juan Carlos University, Spain*

**Eloísa Díaz-Garrido**

*Rey Juan Carlos University, Spain*

### ABSTRACT

*Fashion brands are continuously reinventing themselves to adapt their business strategies to emerging markets. In this paradigm, digital marketing becomes an essential tool for communication to the target audiences online. In digital ecosystems, a new way of sharing information is taking place in which brands interact with users to increase engagement and brand awareness. Accordantly, the objective of the present study is to explore what is the evolution of digital marketing and how it has affected the strategies applied by fashion brands on digital ecosystems after the COVID-19 pandemic. The research develops a Delphi method with the participation of seven fashion digital marketing experts, whose conclusions and analysis of results will allow future research to be linked to the objectives of the research. The results propose and discuss nine future directions and four research proposals focused on digital marketing in the fashion industry. In the future, these proposals may be used by research or fashion marketers as a starting point for future research studies and practice.*

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## INTRODUCTION

Society is aware, one way or another, that the digital age has come to stay, and that even if we want to stay out of its evolution, it is inevitable. In this way, authors such as Pedrajas Trucharte (2020) indicate that digitization refers to the process of including new digital technologies and their complementary tools.

For this reason, Chica, and González (2020), pose another challenge. How to design the customer's marketing strategy, if the market no longer has a physical location, referring to the presence of a virtual market, where products, services and information are exchanged through existing technological networks, which grow rapidly detached from time and space.

According to Pedrajas Trucharte (2020) it is possible to state with propiety that the main economic effects of digitization on the marketing of the environment are: (i)innovate its structures and function, (ii)increase productivity, (iii)expand markets and (iv) improve yields. In addition, the digitization of trade makes available to customers or consumers a wider range of products and services that they can access more quickly and information, also favoring competition between their suppliers (Chica and González, 2019).

From the above it can be indicated that the Digital Age, the marketing areas, are being forced to rethink strategies, functions and operations within a company (Saura, 2020; Saura, Palacios-Marqués and Iturricha-Fernández, 2021). On the other hand, companies must take advantage of the technological tools available, so that by analyzing the information provided by customers, they allow them to make sound decisions, in the identification of new businesses or development of products and services, whose characteristics are attached to the needs, trends and tastes of consumers (Alcaide, 2015).

As Pérez-Curiel, Clavijo-Ferreira, Luque-Ortiz, and Pedroni, (2017) claim, fashion is communication. Fashion is intrinsically related to social habits and is the most accurate indicator of time and time. This way of understanding fashion has not changed since its birth, what it has done is the way to communicate it (Pérez-Curiel et al., 2017).

The recent most social and interactive scenario has generated the emergence of new agents and strategies, ending the one-way conception that dominated communication in the business world (Pérez-Curiel et al., 2017).

Therefore, the main objective of this research is to explore what will be the evolution of digital marketing and its strategies in the fashion sector following the economic crisis arising from covid-19. This is intended to identify the most relevant aspects of digital marketing and changes to a virtual environment as presented by Ribeiro-Navarrete, Saura and Palacios-Marqués (2021). As a result of the problem raised, this research proposes the following research question: RQ1: *What are the main digital marketing techniques used in the fashion sector?* If so, RQ2: *What is the influence of Digital Marketing on the evolution of the fashion sector in the development of digital business models?*

The methodology used in this research is that of the Delphi Method, a method of decision analysis proposed by Rand Corporation in 1948. Delphi is characterized by being a method for structuring an effective communication process that allows a group of individuals to reach a group consensus. The originality of this research is that as companies in the fashion sector must understand the changes that are taking place in digital marketing today as well as the new ways of consuming customers.

The rest of this work is structured as follows. Section 2 presents the theoretical framework and discusses relevant concepts related to digital marketing and the fashion sector. In section 3, we present the methodology used in this study, the Delphi Method. Section 4 reports the results after being analyzed.

Section 5 proposes a series of research questions for future research. Finally, section 6 describes the conclusions, theoretical and practical implications, as well as additional research directions.

## **THEORETICAL FRAMEWORK**

Digital marketing (or online marketing) encompasses all those advertising or commercial actions and strategies that run in the media and internet channels (Aguilera y Bolaños, 2018). This phenomenon has been applied since the 1990s as a way to transfer offline marketing techniques to the digital universe (Aguilera y Bolaños, 2018).

In parallel with the tremendous development and evolution of digital technology, online marketing has been experiencing, progressively and very quickly, profound changes, both in the techniques and tools used (and in its complexity) and in the possibilities it offers to receivers (Aguilera and Bolaños, 2018). According to authors such as Saura, Ribeiro-Soriano and Palacios-Marqués (2021) traditional marketing has undergone a change due to the emergence of a new consumer who decides what to buy, how, when and where and why to use it and what type of service it wants to receive and when it loses confidence, abandons it and changes it.

“Likewise, authors such as Kamba and Rahman (2017) show that the customer is the decisive factor that defines the success or failure of a business although broad in technologies and the development undertaken by today’s competitive business world, the central concentration for the customer remains equal to or greater than in previous times.

In the context of the fashion industry in the digital age, consumer behavior has changed to a digital culture where they became more informative with increased access to information. In their research, they indicate that consumers are not true to fashion brands and focus on the momentum and information gained through social media. In 2014, a study reported that 90% of the data in the world, were generated in the last two years (Plummer, Fiering, Dulaney, McGuire, Da Rold, and others, 2014). This high growth in information data, consolidated by the growth of social networks, the Internet of Things, geolocation, increased broadband, smartphones, gives way to Big Data technology (Joyanes, 2012).

Digitization has been growing in recent years as the world economy has done, but this has not always happened, as, in times of economic crisis, many companies have opted to digitally transform their business model to survive (Palos-Sanchez, Saura and Correia, 2020; Saura, Ribeiro-Soriano and Palacios-Marqués, 2021a).

But at the present time, digitization helps boost economic growth and has become the engine of many of the economies of this planet (Chica and González, 2019). The digital transformation of a company must be carried out efficiently taking into account as Chica and González says (2019), it is not easy to make an effective digital transformation, either at the moment when the company decides to make the change, the way to bring it to its consumers.

The main disruptive effect of the introduction of digital technologies or marketing digitization is to change the nature of supply, demand or both (Dawson, Hirt and Scanlan, 2016). Second, disruptive innovations are those that have the ability to change the existing paradigm of a business model (Willmott, LaBerge and Schwartz, 2017). In short, it is intended to analyze the difficulties and challenges of today’s Marketing and the opportunities provided by technologies to meet the challenges existing in the Digital Age.

## Adapting Digital Strategies to a New Era

Table 1. Similar research

Authors	Description
Chica and González (2019)	They believe that digitization helps drive economic growth and has become the engine of many of the economies, but it must be done efficiently.
Aguilera and Bolaños (2018)	They explain how digital marketing encompasses all the actions and strategies necessary for advertising to be carried out in online media and channels, that is, how to transfer offline marketing to the digital universe.
Kamba and Rahman (2017)	They show that the customer is the decisive factor that defines the success or failure of a business.
Willmott et al. (2017)	Innovations are those that have the ability to change the existing paradigm of a business model.
Plume et al. (2014)	In their research, they point out that consumers are not loyal to fashion brands and focus on momentum and information obtained through social media.
Dawson et al. (2016)	The main disruptive effect of the introduction of digital technologies or the digitization of marketing is to change the nature of supply, demand or both.
Joyanes (2012)	They explain how the high volume of information in online media leads to the creation of Big Data.

## METHODOLOGY

### Delphi Method

Within the different qualitative techniques, this study uses the Delphi method for its suitability to deal with novel and complex topics (Lindstone and Turof, 1975). Although the traditional or classic approach of the Delphi method seeks to obtain lines of consensus identified by the participants (Lindstone and Turof, 1975; Okoli and Pawlowski, 2004), the development of this technique and its application to different areas of knowledge has resulted in different forms or variants of the Delphi method (Skulmoski, Hartman and Krahn, 2007).

In this work, the proposal of Kendall, Smithson and Angell (1992) was followed, emphasizing the ability of this technique to contrast opinions and approaches that allow to identify different alternatives or scenarios for the future in a specific topic of study. By applying this method to the digital fashion marketing industry, we will be able to contrast the opinions of industry experts and new ways of consuming customers.

For Gaitán and Piñuel (1998), the Delphi method is a form of evolutionary qualitative approach research, seeking consensual answers from a group of experts to a number of specific questions.

This technique proposes, a prediction of events in the sector in question (Garrido – Pintado, et. al, 2018).

The Delphi method has a dialogical dynamic in which researchers have a mediating work (Ruiz Ispizúa, 1989; Gaitan and Piñuel, 1998) The studies carried out, as well as their results, through the Delphi method, on the evolution from traditional marketing to digital marketing, according to Zambrano (2018) are of great importance because companies can know what the current and potential customer thinks, based on a market study that allows to create strategies that generate competitive advantages superior to the competition. According to the results obtained by Zambrano (2018), creating a digital marketing strategy is the success for many companies to have a greater and more effective impact. Interviews with digital communication and marketing experts show the consequences of intangible management in new media.



The management of intangible information helps differentiate and strengthen the brand and increase the company's reputation. (Villagra, N. Et. to 2015) In research using the Delphi method, Villagra (2015) aims to deepen the new scenarios of brand communication through digital marketing strategies.

Considering the new situation that brands face in front of their audiences, business communication is understood as a strategy of the company (Argenti, 2014). The methodology chosen in this research is that of the Delphi Method, a method of decision analysis that originates in 1963, when two American mathematicians (Norman Dalkey and Olaf Hermes) designed a technique with the purpose of reaching consensus among experts on a future event. This method (a kind of expert research method) depends on professional knowledge and the experience and judgment of the participants.

Since experts in certain fields are equipped with abundant knowledge, practical experience and subjective judgments, the answers obtained from them are practical and effective (Tsai, et al., 2020). In addition, with this method, the answers are organized scientifically, which allows consensus to be reached on complicated issues as explained (Tsai, et al., 2020).

Delphi is characterized by being a method for structuring an effective communication process that allows a group of individuals to reach a group consensus (Tsai, et al., 2020).

Currently, the Delphi method has evolved into a fundamental tool in the areas of forecasting, evaluation and development of concepts/frameworks, when there is a need to incorporate subjective information directly into evaluation models. (Zheng, et al., 2020) According to explain, (Zheng, et al., 2020), the traditional Delphi method consists of six phases: (1) appointing a group facilitator to select a group of experts based on the subject under consideration; (2) identify experts and assemble a panel of experts; (3) define the problem and develop a questionnaire; (4) exchange ideas on alternatives through Round 1 questionnaires; (5) analyze, summarize and delimit alternatives through controlled feedback; and (6) classify alternatives in subsequent rounds of questionnaires and reach closer consensus. At the end of each round of questionnaires, all questionnaires are returned to the facilitator, who decides whether another round is needed or whether the results are ready to support decision-making.

The rounds of the questionnaire can be repeated as many times as necessary to achieve a general sense of consensus of research. As a subjective and qualitative method, the Delphi method produces reliable results and draws unified conclusions from sufficient data, providing a solid basis for identifying key indicators of research.

Within the framework of the Social Sciences, according to Flores (2011) cited in Huitraleo, Calisto, Mansilla and Gutiérrez (2019) the Delphi method was considered "appropriate" for qualitative research, even if the prospective approach was sought, which is why through this method it was proposed to unite "a knowledge", which was increased by the participation of the different specialists (Varela-Ruiz, Díaz-Bravo and García-Durán, 2012, cited in Andrés et al., 2019), being this group of people, who will have an opinion on a certain research objective (Gil-Gómez and Pascual-Ezama, 2012), in this way, reliability will increase (Rosas, Sánchez and Chávez, 2012, quoted in George and Trujillo, 2018) and trustworthy (Pozo, Gutiérrez and Rodríguez, 2007, quoted in Gutiérrez-Artacho and Olvera-Lobo, 2017), will reduce the intersubjective judgment (Reguant-Alvarez and Torrado-Fonseca, 2016), the autonomy of the participants will be verified (Véliz, et al, 2013), using statistical procedures (Zartha, et al, 2015).

The characteristics that distinguish this technique from other group techniques are three: (i) anonymity, (ii) having controlled feedback and (iii) group statistical response. In this way, the elements of the method are: (i) the existence of an interventionable problem, (ii) a coordinating group (may be the principal investigator alone or with a small group of persons) and (iii) A group of experts (a group of people with appropriate knowledge, characteristics and experience for the achievement of the objective of the study).

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In consensus methods, experts are those who have knowledge and experience on the subject of study. A good description of the defining characteristics of whom we consider an expert is necessary, similar to the inclusion criteria of any study. (Romero-Collado, 2020).

Non-standardization and adherence to the Delphi methodology can jeopardize the validity of the results obtained from its use in research. Researchers should consider the basic methodological aspects that define the Delphi method to include in their work. (Quezada et al, 2020). After determining the objectives of the study, the first task was to determine and choose the experts and academics belonging to the digital marketing sector in fashion.

### **Data Sampling**

For two weeks, in November 2020, researchers contacted different industry agents by phone and email. The selection criterion was based, first, on the interviewee's ability and secondly, it was intended to give voice to all the new uncertainties raised in the fashion sector. The approximate duration of the process and the use of the information anonymously was also reported. Researches motivated the answer, explaining the potential benefits of the study not only for the academic environment, but also for the professional field.

Following the round of previous contacts, a total of 15 private emails and messages invitations were sent on social media profiles to the expert that composed the panel. To this communication, 7 experts responded so the final sample was reduced to 7 professionals and academics experts in digital marketing in fashion, designed fashion, fashion history, fashion advertising, among others areas. After setting the sample in December 2020, the first questionnaire was sent with an open question:

*How do you think digital marketing is changing and will change the evolution of the fashion sector?" I am currently conducting this research with a trajectory for five years to this day, but if there is one thing, we are all clear about is that the situation in the past 2020 has turned around all the plans and strategies established, or perhaps not, it is simply the opportunity to launch those ideas earlier than expected. Therefore, it is very interesting to know the opinion and vision of professionals dedicated to digital marketing, e-commerce, influencer marketing... of the fashion and luxury sector.*

The first questionnaire was analyzed during January 2021 by the coordinating group finding consensus for a second questionnaire in February 2021 consisting of open and valuation grade questions explained below in results analysis.

Finally, in March 2021, all the necessary data were obtained to begin the analysis of results and be able to reach conclusions, which will be detailed below despite being a fairly current topic that lacks previous information within the fashion sector.

*Table 2. Delphi methodology questionnaire summary*

Type of survey	Month/Year	Number of Participants	Number of Answers
Open question	November 2020	15	7
Quiz 1	December 2020	7	7
Quiz 2	January 2020	7	7

Source: The authors

## **ANALYSIS OF RESULTS**

After having exposed the state in question, objectives and justifying the object of study, we are going to present the most remarkable results:

As a result of the methodological process developed, it has been proven that digital marketing provides viable opportunities for change in the fashion sector for brands to establish relationships with consumers and promote brand loyalty.

### **Quiz 1: How Do You Think Digital Marketing is Changing and will the Evolution of the Fashion Sector Change?"**

Thanks to digitization and automation of digital marketing, marketing has been transformed, it allows us to reach those who identify with our brand, our values, our designs, being able to impact each one of them at the right time, in the right place., with the appropriate advertising format and the creative message adapted to your communication style, which allows a more relevant and intelligent marketing.

On the one hand, 40% of the experts (3 of the 7 members), after their answers, come to the conclusion that digital marketing allows brands and large firms to get to know better each of the people they are in contact with. On the other hand, it helps them to understand them better, to know their aspirations, their fears, their concerns, their desires, their beliefs, their evolution in ideas ... which allows them to create and design products and services adapted to the target audience.

On the other hand, 60% of the experts (4 of the 7 members), consider that the digital environment has allowed the creation of new forms of business: such as the sale of second hand, the subscription to a brand to be able to have of a certain number of models per month, and the rent.

### **Quiz 2: According to the Research Topic, What Variables Do You Think is Necessary to Take into Account, apart from what has Already been Mentioned Above?**

After the round of surveys corresponding to the research methodology, the experts consider that one of the most important variables to take into account in the digitization of the fashion sector through digital marketing is the type and quality of communication and the use of strategies related to influencer marketing, therefore 70% (obtaining the following results: SEE TABLE 3) of the experts consider that the sector is facing a process of change in the way of communicating after the Covid-19. Influencer Marketing is a very important variable to take into account due to the influence in the sector. Today many of the fashion brands use influencers to promote their product launches and this is automatically

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reflected in sales. This type of marketing is direct and precise and it achieves brand awareness, loyalty and increased sales.

Table 3. Obtaining results after the questionnaires.

Strategic variable	Result goal
Quality in digital communication.	10% of experts consider that the form of communication is what will determine an effective customer service until customer loyalty online.
Influence Marketing	60% of experts consider that the use of new influencer marketing strategies will be decisive to create brand positioning, visibility and attraction of new customers online.
New shopping trends	5% of experts consider that the determining factor in new digital marketing strategies are new shopping trends such as renting or selling second-hand
Economic and social situation	The current new economic and social situation will be decisive for 25% of experts when it comes to making new digital marketing strategies.

Source: The authors

## What Grade would you Assign to the Following Variables?

After proposing the highlighted question in the questionnaire, the experts had to answer the according to the degree of importance, with 1 being very unimportant, 2 not very important, 3 neither very important nor not very important, 4 important and 5 very important (See Figure 1). Consumer adaptations to online shopping, accelerated by the pandemic, are unlikely to end or slow after COVID-19 passes. In this regard, the pandemic may be a trigger that induces the late majority, who have been reluctant to the new way of buying, to finally buy online.

Figure 1. Degree of importance according to strategic variables.

Source: The authors

VARIABLE	IMPORTANCE DEGREE				
INVESTMENTS IN DIGITAL MARKETING			20%	60%	20%
	1	2	3	4	5
MAINTENANCE OF PHYSICAL STORES				50%	50%
	1	2	3	4	5
ONLINE CONTENT CREATION				25%	75%
	1	2	3	4	5
DEVELOPMENT OF OFFLINE MARKETING STRATEGIES			25%	25%	50%
	1	2	3	4	5

As can be seen in Figure 1, all the variables have obtained a high degree of importance for most of the experts participating in the research. It should be noted, on the one hand, the high importance of almost 100% of the creation of online content by parts of fashion brands when developing the digital marketing strategy and on the other hand, the slow and slight decrease in the degree of importance in the development of offline strategies, which means that currently they are still necessary but that the evolution to digital marketing must be mandatory and imminent on the part of companies.

### **What Motivations does a Fashion Company Find to Maintain, at Present, after the Covid-19, the Maintenance of Physical Stores?**

The previous study, after consensus with the professionals of the sector, of the experts finds that the two dominant motivations to buy in physical stores instead of buying in online stores are immediate possessions and social interactions, while online purchases tend to be substantially more convenient and economical. However, they agree that online shopping offers greater flexibility in terms of time, location and variety of products.

Although late users are likely to be more skeptical when evaluating new experiences, their online shopping experience is likely to be a positive one as it provides a relatively safe way to shop during the pandemic and is therefore likely to continue. shopping online even after the pandemic passes.

Despite creating and changing purely digital strategies and going through, as has been said before, a health crisis after Covid-19 where they bet on online shopping and take advantage of the advantages that this business model offers, 70% of the Respondents consider the continuity of physical stores by brands and the creation of offline strategies to be very necessary.

Ultimately, brands have had to adapt their way of communicating, their business models, their strategies and even the production of new products and collections.

The research has also been able to verify that the experts have been able to see that retail fashion is undergoing a series of significant changes caused by: new digital marketing technologies, online sales platforms, new forms of communication that allow reaching a young public and transmit the ethics of sustainability. The pandemic will change not only the rhythm of daily life, but also consumption practices.

In addition, new business models, such as second-hand rental or sale platforms are increasingly powerful thanks to the new challenges in the era of Covid-19 due to changes in work and lifestyles.

Digitization has also allowed the creation, as mentioned above, of apps for the sale of second-hand garments, but which currently consumers seem to doubt in terms of hygiene despite being a model that favors the sustainability of the sector.

### **What Digital Marketing Techniques are Important to Consider in a Fashion Company?**

As a result of the methodological process developed, it has been found that digital tools (See Table 4) provide viable opportunities for brands to establish relationships with consumers and promote brand loyalty.

Tools on social media and other online platforms provide real-time data on consumer behavior and interests and how and where they spend time and money. Fashion brands get a high return on investment through digital marketing.

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The SEO tool allows fashion brands to carry out their web positioning strategy and thereby detect sales opportunities, through data analysis, keywords, etc., that users may be using.

The use of social networks in fashion: Instagram, Twitter and Facebook is one of the main digital marketing strategies in the fashion sector, since in addition to generating quality content, it has also allowed dialogue with consumers to be continuous to achieve loyalty from them, making it the most important asset of a company. Fashion is the sector that invests the most in paid platforms for the creation of online ads: Google Ads, Social Media Ads.

On the other hand, the role of the influencer in fashion brands refers to the attraction of fans since the success of these figures allows them to attract consumers who are reflected in a specific identity and personality. This social characteristic of the industry makes the digital environment and the social media environment the ideal space for users to share their tastes and interests in fashion.

*Table 4. Main techniques of digital marketing in fashion*

<b>Marketing Technology</b>	<b>Description</b>
<b>SEO</b>	It is the process of maximizing the number of visitors to a website, ensuring that the website appears in the top search list.
<b>SEM</b>	In the fashion sector, e-commerce through Google Ads, provides an increase in sales that can grow the web business
<b>Instagram</b>	This social network helps to increase search engine optimization, which increases brand awareness.
<b>Facebook</b>	It is used to provide products and fashion brands, but also, to establish relationships and create communities of followers.
<b>Twitter</b>	It is one of the social networks most used by fashion brands, since it has the ability to achieve dynamic communication between the brand and the consumer.
<b>CRM</b>	It enables companies to create and maintain long-term relationships with existing clients while optimizing corporate performance with the organization.
<b>QR Code</b>	It is a technology that simplifies the purchase process by scanning the QR code on mobile devices
<b>Big Data</b>	Fashion brands can use data analytics. It is the science that allows information to be extracted and can reveal trends and metrics to influence current affairs and thus plan future content in the narrative of communication with consumers
<b>Influencer</b>	Influencers are the people who show social media trends directly to consumers

Source: The authors

## **DISCUSSION**

As mentioned above, digital marketing and its evolution in the fashion sector after Covid-19 is a very recent research topic which does not allow us to recapitulate enough data at present, but it will allow us to observe how the Companies and consumers are transformed to new shopping behaviors and how new strategies such as sustainable fashion production can help to favor digital marketing and communication tools in the fashion sector. From now on, not only marketers will observe their customers and their behavior, but it will also be consumers who will observe companies to see how they adapt to new circumstances and new ways of producing their products.

According to Castaño and Jurado (2016), the arrival of the online generated a change in the way we communicate and interact. Digital marketing has emerged as a solution to new technologies and a new way of using and taking advantage of the internet.

The Covid-19 pandemic has not only been a challenge for public health, but also for the world's socioeconomic system. 28% of GDP depends on SMEs (Applied Economics, 2019), therefore, it is important that they have a presence on the internet and continue to be in force and survive in this crisis. (Hoyos-Estrada and Sastoque-Gómez, 2020)

Furthermore, it can be seen from the research results that a significant part of late users who were opposed to buying online entered e-marketplaces after COVID-19. Among those surveyed, 11% of Gen Z (Gen Z), 10% of Millennials and 12% of Gen X (Gen X), and 5% of Boomers have bought something online for the first time because of to the pandemic. (Kim, 2020). Fashion companies and digital marketing professionals should be attentive to the purchasing behaviors of new audiences from now on since their digital marketing strategy will depend on the demands of online shopping and the way these audiences communicate.

Authors such as Brydest T, Retamar M. and Hanlon M., (2020) talk about whether Covid-19 and digitization will and will allow a transition to a more sustainable environment in the fashion industry. By pursuing economic and commercial objectives (Keller et al., 2017), companies can achieve a change in user behavior, or behavior modification (Zuboff, 2019). Therefore, we will have to be attentive for future research as sustainability will be part of both the production strategy and the digital marketing strategy for fashion companies when communicating their products.

Adriana Domínguez, executive president of Adolfo Domínguez, anticipated an anomalous 2020 exercise for Europapress.es in July 2020 as the coronavirus crisis caused the closure of 390 stores in 22 countries around the world, which led to the launch of a contingency plan to replace stores with the closure of those that were not profitable and create a new profitability plan that was increased by 30% thanks to the fact that online sales increased 158% in this period.

On the other hand, a problem that derives from virtual commerce is detected since the lack of trust on the part of users, many times discourages the consumer from making a purchase. *“Storytelling techniques and quality content from fashion brands can persuade consumers and present reasons to buy products based on consumer conversations about what they want.”* (Dreidame, 2018).

Consumer buying behavior or decision making is a final decision of the customer, which takes it based on the impact produced on the purchase stimulus. The seller plays an important role in inducing the customer through external marketing efforts through product, price, location, or promotion. But as Udayangani Rathnayaka (2018) says *“consumer behavior in the digital age has changed to a digital culture where they have become more informative, therefore, it has become a great challenge for companies, to retain customers for a long period of time”*.

One of the experts interviewed indicated: *“On the one hand, thanks to digitization and the automation of digital marketing, marketing has been transformed, it allows us to reach those who identify with our brand, our values, our designs, being able to impact each one of them at the right time, in the right place, with the right advertising format and the creative message adapted to your communication style, which allows a more intelligent and relevant marketing. Digital marketing nowadays allows us to reach quality people and not only reach people, that is, quality vs quantity prevails”*.

Although digital marketing and content personalization make it possible to quantitatively evaluate the effectiveness of advertising campaigns and social ads in digital environments, they also lead to the

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emergence of new trends in fake news and abusive activities related to advertising (Lies, 2019; Liu and Terzi, 2010)

Content personalization, that is, segmented targeting based on data-based models and the testing of new market segments, includes actions focused on the analysis of user data applying innovation models that study their actions online (He, Bahirat, Knijnenburg and Menon, 2020). In this regard, another of our interviewees pointed out: *“Digital marketing and digitization, technology, bring firms and brands much closer to users. Digital means: globalization, capillarization (it reaches any point that has an internet connection), freedom of decisions for the people who use it, multi-connection, experiential moments, such as 3D immersions, which activate different senses through sound, 360° image and video; It allows activating the imagination of those who find or are interested in our brand, it allows us to strengthen ties with them, it allows a more fluid communication. It is infinite because it is in constant movement and innovation. Nowadays you can attend a parade without having to travel, you can get to know the backstage, the workshop where the designs are created “*

In summary, based on the results of this study, we formulate the following agenda for future research on the behavior of digital marketing in the fashion sector (See Table 5).

Table 5. Research questions

Research areas	Authors	Research Questions
Digital Marketing	Kannappan (2020)	<ul style="list-style-type: none"> <li>• How should the changes be when communicating with users in the digital age?</li> </ul>
	Kantar Indonesia. (2020)	<ul style="list-style-type: none"> <li>• What changes in consumer behavior does digital marketing produce in users?</li> </ul>
	Čiarnienė and Vienažindienė. (2014)	<ul style="list-style-type: none"> <li>• What are the digital marketing strategies that fashion companies should adopt today?</li> </ul>
Covid-19	Balram. (2020)	<ul style="list-style-type: none"> <li>• What is the margin of adaptation of digital marketing in the fashion sector in a next pandemic?</li> </ul>
	TradeGala. (2020)	<ul style="list-style-type: none"> <li>• How has Covid-19 impacted on the fashion sector?</li> </ul>
	Thornton. (2021)	<ul style="list-style-type: none"> <li>• Is the maintenance of physical stores still profitable?</li> </ul>
Influence Marketing	Aguilera y Baños. (2016)	<ul style="list-style-type: none"> <li>• Until when will influencer marketing be profitable for fashion companies?</li> </ul>
		<ul style="list-style-type: none"> <li>• Will influencer marketing create a profitable business model for the fashion industry in the future?</li> </ul>
	Stelzner. (2015)	<ul style="list-style-type: none"> <li>• Will influencer marketing make traditional marketing strategies disappear?</li> </ul>

Source: The authors

### 5.1. Research Propositions

In order to guide future research in this area, we formulated several research proposals based on our results. The research proposals are aligned with the current digital marketing categories shown in Table 2, which are the results of the literature review and the framework consulted to establish the theoretical foundations of the research. Therefore, considering the fact that the fashion industry is one of the global



industries in the world where several processes are interconnected with each other to satisfy end users. Also, Aiarnien and Vienna-indien (2014) pointed out that fast fashion is customer-driven, where retailers have to change according to the changing demands, desires, desires and needs of consumers. Change is inevitable when fashion brands must develop their leadership qualities by being agile. This inevitable change can be divided into smaller versions to understand the complexities involved. Thus, based on the complexities you can make the best decision to achieve the results in a simple way.

**Proposal 1.** *The increase in online sales has led to a massive change in consumer behavior, as consumers now have new shopping facilities and payment methods.*

The Covid-19 has caused fashion companies to redo their marketing strategies to orient their companies to the digital age. Fashion brands planned strategically pretty well earlier this year 2020 and started production, but due to COVID-19, they struggle to boost inventories until October, he says (Balram, 2020). In addition to existing problems, the COVID-19 pandemic is a major challenge for fast fashion brands because stocks at outlets have become old and faded from their originality. Therefore, the destruction of old stocks and the planning of a new production is hectic. However, the result will be win or lose (TradeGala, 2020).

**Proposal 2.** *Covid-19 has caused fashion companies to redo their marketing strategies to guide their companies to the digital age.*

It is proof that social media has changed the way consumers buy, think and act. The main consequence of this process of profound changes, to which the traditional marketing paradigm has been subjected, is the emergence of a completely new consumer, an enormously empowered consumer who decides what he wants to buy, how, when and where to buy it, how and for what do you want to use it and what type of service do you want to receive; And when he loses confidence, he abandons it and changes it. (Aguilera and Baños, 2016).

**Proposal 3.** *Increased brand awareness and customer engagement is a direct and indisputable consequence of using social media.*

## CONCLUSION

This research has proposed the study of how brands in the fashion industry are redesigning their business models and their marketing departments after Covid-19 and digitization through new technologies and digital marketing. The methodology developed has been an overview through the participation of experts from the fashion and digital marketing sector using the Delphi Method.

According to the research question proposed (RQ1: *What are the main digital marketing techniques used in the fashion industry?*) fashion companies, today, continue to use the same digital marketing strategies to attract new consumers and communicate their products online. A large investment is still being made in SEO and SEM techniques. However, it is increasingly common, since the appearance of Covid-19, that fashion companies invest more budget in influencer marketing, since it has been shown that it is one of the strategies that best reaches the consumer in the purchase process, since the form of communication is changing. According to RQ2 (*What is the influence of Digital Marketing in the evolution of the fashion sector in terms of the development of digital business models?*) fashion brands are taking care of the image and communication in the media facing the audience can be a turning point for brands and thus declare a new beginning as well as invest a greater percentage of budgets in new business models related to marketing digital (Čiarnienė and Vienažindienė, 2014).

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Currently, fashion companies are redoing their marketing plans based on the daily observation they make of consumers and their purchasing behaviors after the appearance of Covid-19, trying to understand what are the changes that have arisen in the sector and how they will evolve. over time.

### **Theoretical Implications**

After the first round of the study using the Delphi Method, the experts believe that we must not only talk about the influence and impact of Digital Marketing in the fashion sector, but also about digitization in general. Digitization and digital marketing have made it possible to integrate the virtual world into the real world. Both are like gears on a Swiss watch that fit together perfectly.

Digital marketing is nothing more than marketing, accompanied by technology, with the advantage that said technology advances rapidly. Likewise, the internet and digital marketing create a point of union between brands and customers, a world virtual connection, where thanks to technology this virtual world can be integrated into the real world.

As always, changing cycles with media coverage, it remains to be seen whether the pandemic will have a lasting effect or whether the fashion industry will move on to the next crisis, leaving behind the lessons learned so far.

It is clear that fashion faces a very uncertain future, what is perhaps also clearer is that the industry of tomorrow looks very different from the one we once knew. Future research could examine what this change will look like when implementing digital strategies and definitive new technologies, following the health crisis after Covid-19 in the fashion industry.

### **Implications for Marketers**

The first thing that a company in the fashion sector must identify is what its current target audience is and how it is evolving after the boom in online shopping, since its investment in digital marketing will depend on it and what kind of tools it should use to carry out viable strategies. Second, users want to feel identified with the content generated by fashion companies as this will provoke positive opinions from users influencing the purchase decision of new ones, to generate greater confidence in the face of the current mistrust due to the pandemic. With all this, communication agencies will be able to identify the digital marketing strategy to retain new users and give rise to a new way of totally two-way communication.

Marketers should be able to analyze and forecast fashion trends before customers switch to competition, so that the fashion professional becomes a trendsetter and digital media becomes the best platform for acquire and convert customers through the measurement and optimization of digital media in order to satisfy customers to retain them loyal for life (Kamba and Rahman, 2017)

### **Limitations and Future Research**

The results could be used to generate studies of new business models in the fashion industry after Covid-19 and the implementation of new digital marketing strategies adopted by fashion brands. In this way, experts will be able to better understand which way should be taken to develop digital marketing strategies in their companies.

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## **KEY TERMS AND DEFINITIONS**

**Digital Fashion Industry:** Digital ecosystem of fashion companies in which strategies focused on online marketing are carried out.

**Digital Marketing:** Main communication, commercial and sales strategies promoted on the Internet.

**Fashion Digital Experts:** Experts in fashion strategies developed in the digital ecosystem.

**Influencers:** Opinion leaders in social networks with millions of followers.

**Social Media:** Communication channels to increase engagement between companies and users.

## Section 3

# Case Studies: Advances in Digital Marketing Strategies Applied to Industries

*This section presents case studies and future research lines for the digital marketing sector focused on data analytics. The case studies encompass approaches to different business industries to, finally, show the pros and cons of developing digital strategies according to the characteristics of each case.*

# Chapter 12

## How Digitalisation Is Influencing Traditional Food Restaurants in the Management of Their Marketing Strategies

**Juan-Gabriel Martínez-Navalón**

*Rey Juan Carlos University, Spain*

### **ABSTRACT**

*There is no denying that digitalisation is a new revolution. At a time when technology is taking over all aspects of society in an exponential way, not introducing it into the management of companies is a clear mistake that could lead to their disappearance. But we cannot forget that the incorporation of technology is a challenge for any type of company and sector. This study analyses the importance of digitalisation in traditional restaurants and its influence on the management of marketing policies using case study analysis. Therefore, the aim of this study is to show how digitalisation for order management in these companies can also be applied to marketing policies. This is because, by monitoring and storing the customer's behaviour in the ordering process from start to finish, it is possible to know their preferences and searches in a more concrete way. Such information enables the company to maximise its resources by applying policies designed to meet customer needs, as well as to design targeted advertising to increase the chances of success of the advertising campaign.*

### **INTRODUCTION**

More and more companies in the hospitality sector are opting to innovate in their order management systems (Modica et al., 2020). Such technology implementation not only helps to increase productivity, efficiency and control over the business' stock, but also allows data to be collected when customers place their orders (Line et al., 2020).

The systems applied for order management and data collection are diverse. The diversity is due to the multitude of characteristics that the establishment may have when implementing digital order chain

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systems. It is influenced by the investment budget for the implementation of the technology, type of business, location, capacity, income, etc. As well as more staff-focused ones, which are sometimes decisive, especially in family-run establishments where staff turnover is low. In this case the characteristics to take into account are the age, aversion to technology or the technological knowledge of the staff. It is important to bear in mind that these systems were implemented by large multinationals, but nowadays small establishments have also computerised their order management, in a very high proportion.

The digital revolution had already reached the hospitality sector at all levels in the second decade of the 20th century. To a greater or lesser extent, we began to hear that the survival of establishments no longer depended solely on prestige, quality or price, among others, but that technology was here to stay and to be an almost indispensable element for the viability of any hotel establishment (Filimonau & Naumova, 2020).

Implementation of software, cash drawers, PDAs (Personal Digital Assistant), digital letters, online ordering systems, etc. They allowed greater control of the business and increased its profitability, which in the future could determine viability, but was not entirely decisive. Everything changed when in early 2020 the Covid-19 global health crisis exploded (Belzunegui-Eraso and Erro-Garcés, 2020; Hou et al., 2020; Oliver et al., 2020). In Spain, as in the rest of the countries in the world, the pandemic has forced companies and people to change their living and working habits, since March 2020 a state of alarm has been declared and most of the establishments have been temporarily closed (Pedauga et al., 2021; Pérez-Calle et al., 2020). In the case of companies that could opt for teleworking, they have continued to operate remotely. This change has had an economic impact on companies. Quarantines, restrictions and new regulations have brought about a turning point in the digitisation of the hospitality sector.

Digitisation is no longer an alternative to be considered only to increase profitability and improve management control. The pandemic has forced an implementation of digitization (Skulmowski & Rey, 2020). Health regulations and the collective fear of using physical letters, the closure of establishments and their adaptation to take-away food or the reduction of capacity. It has made digitalisation absolutely necessary for the survival of hospitality businesses (Schaffer et al., 2021).

The technological revolution has accelerated and has been a floater for many companies, which have been clinging to it with great effort. In the case of large franchises, they have used this change to implement new, more disruptive systems that would have been criticised at other times but are now seen as positive by the customer (Hobbs, 2021). This is the case of McDonalds, which has eliminated the McAuto order-taking staff and implemented an artificial intelligence system to take orders. It is also common for most franchised fastfood outlets to have virtually eliminated checkout staff and replaced them with digital ordering systems.

This technological implementation mainly in the order channel is also exploited by company managers. The electronic management of customer orders provides a series of information that can be very important for the marketing department. The information obtained will make it possible to gather relevant information for marketing policies. Information such as target customer classification, payment method used, order schedules, location from where the order is placed, hot spots on the menu, etc. (Prado-Román & Nebreda, 2018).

This chapter will show how the technological revolution in the hospitality sector is allowing not only to improve and optimise the ordering system in restaurants, but also it makes possible thanks to the collection of information, to design better marketing strategies that are better adapted to the needs of customers.

## ***How Digitalisation Is Influencing Traditional Food Restaurants in the Management***

It is important to note that this study provides an insight into the case of a traditional restaurant and its digitalisation process, which has been considerably accelerated by the COVID-19 pandemic. But this process is not new for pandemic reasons, as digitisation in the hospitality sector has been growing in recent years. There are many studies that show how information can be obtained and how to analyse it in order to make a profit from business management and marketing strategies (Saura, 2020).

This analysis of the case of the Rincón Manchego Restaurant is useful as an example when considering digitalisation in traditional restaurants with manual management habits and few digitalisation. This analysis shows that this economic investment, which a priori can be a barrier for many small businesses, is highly profitable when the whole system is managed efficiently.

Therefore, the study will be developed. First part is the literature review, where the importance of a good order management and the collection of all the data generated in it will be discussed. This literature review also analyses the importance of security in data collection. Subsequently, I proceed to explain the methodology applied in this study, which will be developed in the case study method of the Rincón Manchego Restaurant. Finally, in the conclusions section, the conclusions obtained in the study are developed, and different proposals are put forward in terms of managerial implications. The conclusions section also discusses the limitations of the study and possible future lines of research. The future lines of research proposed reflect the evolution of digitalisation within the hospitality sector and the need to analyse all these changes.

## **DIGITISATION OF THE ORDER CHAIN**

The digitisation in the hospitality industry of its order chain has not only made the work of the staff easier, but also increases the quality of customer service. Various technological improvements can be found around the order chain of an establishment. From software that manages orders and payment, mobile apps that allow customers to order without the physical presence of company staff or computer systems that manage the kitchen and provide instant orders (Kubicki et al., 2013).

Consumers no longer just want speed, good service and quality. Most consumers in the 21st century are looking for a different, totally personalised dining experience. This desire is partly satiated by the technological advances that restaurants possess (Martínez-Navalón et al., 2020).

An example of digital transformation are the strategies being carried out by wholesale companies in the hospitality sector such as Mahou-San Miguel, Makro or Campofrío. These companies have plans to support technology transformation in the hospitality sector. Both companies give training courses for the implementation of technology, advise restaurants on their digitalisation, give courses on the use of social networks, etc. This is because they are aware of the needs of their customers (the restaurants). Failure to adapt to this digital revolution would lead to a drop in sales or, in a more extreme form, to the disappearance of restaurants. This would have a direct impact on their suppliers.

The order management process begins with the customer searching for the restaurant in the different mobile applications. Some of the most widely used are El Tenedor, Tripadvisor or GoogleMaps. Where it is possible to find information about the establishments, their menus, prices, opening hours. These changes in habits are causing the use of this type of technology associated with smartphones to force restaurants to digitise to a certain extent. Not appearing in these search engines reduces the number of new customers by almost half (Gelashvili et al., 2021).

### ***How Digitalisation Is Influencing Traditional Food Restaurants in the Management***

Once the customer has visualised the establishment and decides to try the food, he/she has two options. Eating on the premises or ordering take-away food. The latter option has increased considerably in restaurants during and after the Covid-19 pandemic. This second point in the order chain is also mostly handled by digitised systems. These manage bookings or orders, facilitating management and avoiding possible human errors.

Once the customer is in the shop, another process within the order chain begins. In this case, the visualisation of the products. Due to Covid-19 regulations, this visualisation is mostly done digitally to avoid having an object that passes from customer to customer. Some establishments have chosen to upload the menu on a generic mobile application for the hotel and catering industry, others have decided to digitise the menu on their own website or on their own mobile application. What they all have in common is that the customer can access by means of a BIDI code (QR reader). The possibilities are wide and varied due to the great technological advances that the establishments are using.

The third step in order management is the placing of the order or taking of the order. In this step, differentiations must be made due to the characteristics of the establishment. In the case of fast food restaurants with highly standardised products, with very little in-store processing, self-ordering systems are often implemented. Brands such as McDonalds, Burger King, Carl's Jr or Five Guys have opted for this system where they provide the customer with an interactive screen with the entire menu and where the customer can place their order.

It should be noted that this self-ordering system can also be carried out using mobile applications that allow the same process to be carried out as on the interactive screen, but from our mobile phone. This same application usually also allows the ordering of food at home, so that from a single system we can manage the entire ordering process of an establishment.

In the case of restaurants with more elaborate menus, where the customer not only wants to eat, but also wants to enjoy the moment by living a unique experience. An ordering system is usually chosen where the customer-waiter relationship is not lost. The customer usually no longer has the option of placing the order alone, but is advised by an employee. In this case, digitalisation is sought to help the establishment in its management, but without losing contact and affinity with the customer. This process is mostly carried out with a PDA on the table itself. Due to the great speed it provides, although there is also the option of taking the order with a notebook and then entering it into the programme via a touch screen monitor used by several waiters. The latter option is less widely used because of the potential for errors that can be generated by duplicating the process, but some establishments use it because it is less expensive to install a computer for several waiters than one PDA per waiter.

Once the order is placed, the order is distributed to the different processing stations in the restaurant. The products ordered are produced there. With the advantage that failure due to miscommunication when placing the order is practically non-existent.

The last process in the order chain is the final checkout and payment. A process that without digitisation has two main problems. Possible errors in transcribing and adding up the amounts during the preparation of the account and the delay in this process, which can sometimes be lengthy and complex.

It is proven that the digitisation of the order process increase the company's profits. There are two main reasons for this increase in profits. The first reason is the reduction in the time taken to carry out the different processes, which increases staff productivity. By reducing process times, the restaurant increases customer turnover per service. The second is that by having all order management digitised, errors in the production of products practically disappear. There is no interference or misunderstandings from the time the order is placed until it is processed.

## ***How Digitalisation Is Influencing Traditional Food Restaurants in the Management***

Taking all of the above into account, the implementation of digitalisation in the ordering system is not only beneficial for the company, but necessary for its survival. The reduction of time, the improvement in the rotation of tables, the reduction of errors, the control of stock, in short, the implementation of digitalisation systems in the ordering system provides an increase in profits in hospitality businesses.

But there is more: by digitising all these processes, very relevant information is being generated for the company. The digitisation of the ordering process allows the collection of data that is generated during the ordering process. Data such as table turnover time, peak sales hours, types of products sold in time slots, customer preferences, etc. This is very valuable data for the management of the company and specifically we can use this data to design the digital marketing policies of hospitality establishments (Ribeiro-Navarrete et al., 2021).

## **DATABASE GENERATION IN THE HOSPITALITY INDUSTRY**

Nowadays, data-driven digital marketing strategies are widely used by companies to reach customers more effectively (Jose Ramon Saura, 2020) It is a digital evolution of relationship marketing, but with the same premises: listening and giving the customer what they want (Reyes-Menendez et al., 2019).

In this case, in order to choose the appropriate strategy or strategies, we must first know the characteristics of our clients (Cross et al., 2009). In the hospitality sector, the customer-to-income ratio is much higher than in other sectors, as the percentage of customers who enter the establishment and consume is very high. This relationship allows us to analyse almost in its entirety what the customer demands and how he demands it (Fernandes et al., 2021).

The content generated by customers via the order chain has been steadily increasing since the implementation of the first hospitality management software. This information gathering in the initial hospitality sector has been joined by the generation of social media content, booking applications, payment applications, etc. (Dossena & Mochi, 2020).

It is important to know how to sell the product the customer needs at the right price and the right time (Kimes, 1999). To this end, it has become essential to develop forecasts to help guide managers, which is why the collection, management and processing of data has become essential in the hospitality sector. Software such as HOSTELCO, HOSTELTACTIL, BDP, LOYVERSE, etc, allow not only to see purchase data, table service times, type of customer, invoicing per customer, best-selling products, etc, not only in a numerical form, but also provide graphics and visual panels that improve interpretation and allow information management in a quick way (Fernandes et al., 2021).

The type of restaurant and its characteristics must be analysed beforehand. This allows the data collection to be adapted according to the type of customer, as the target customer changes (Wu et al., 2020). Any adaptation will allow for different data collection, due to the variety of the service. For example, in a fast food restaurant it collects navigation information via the digital display at the time of ordering, or the duration of ordering. In the case of a restaurant of a standard category, the way the reservation is made, the food consumed, the rotation time, etc. are measured (Medeiros & Salay, 2014).

This large amount of collected data is called “Big Data” (Mayer-Schönberger & Cukier, 2013). This vast amount of information provides a powerful source of knowledge that is studied for patterns in customer interactions (Lim et al., 2019). Such well processed information helps the company to decide how to engage with its customers more effectively and to identify the most valuable customers. They can

spend more time on them and thus generate higher cash flows. This has been demonstrated by several studies that show that companies that use Big Data are more productive and profitable (Line et al., 2020).

Data collection and processing is seen as a new source of competitive advantage (Kunz et al., 2017). For the collection and storage of data to obtain information comes to create significant value not only for the company, but also for the global economy. It improves productivity and therefore the competitiveness of the company, generating a substantial economic surplus. But it is important to clarify that these data alone do not have a value on their own. Data must be associated with a commercial context (Line et al., 2020). In this study where the importance of the data collected in the restaurant order chain is analysed, the value generated can be perceived through a range of marketing strategies: advertising, market research, merchandising, customer relations, resale, etc.

For example, the study conducted by (Li et al., 2018) demonstrates that data has value when it is used to guide a digital social media advertising strategy (Saura et al., 2021). It allows to companies to know customers' preferences, food tastes, time of day when they order, etc. The data ensures that the advertising message is correct according to the tastes and needs of the customers, as well as it provides correct time of publication.

Such data can also be used to effectively manage companies' integrated management systems, as well as customer management platforms (Talón-Ballesteros et al., 2018). Data allows us to allocate resources in restaurants more efficiently, reducing costs. For example, if we have a sales history, we can prepare more or less food, or reinforce the services with more staff for a better service. As well as knowing what to offer to which customers. This will improve the economic performance of the restaurant (Fernandes et al., 2021).

But data collection and processing should not be seen as something negative for the customer. Value creation reciprocally affects the customer and the company. The interaction between company and customer means that the company knows what the customer wants and can therefore offer it to him, while the customer will more easily find what he wants (Ramaswamy & Ozcan, 2018).

But just because data collection is beneficial to the customer does not mean that the customer sees it. It is important to bear in mind that it is necessary to know how to manage data collection, not only from the point of view of data management for subsequent use, but also from the point of view of user privacy when managing their data. (Saura et al., 2021). Such data collection may be viewed negatively by the user and may affect product satisfaction. An order chain that asks for personal data, such as name, telephone number, etc., can lead to rejection by the user. The company must study whether the data obtained and the profitability that will be obtained from it, compensates for possible customer anger.

As more and more customers are becoming wary of their privacy, companies need to be clear about what kind of information they want to collect. It is common for fully digitalised order chains to suffer high abandonment rates at the time of registration and payment of the order (Saura, Ribeiro-Soriano, et al., 2021). Mostly because they do not want to register by giving their details.

On the other hand, it may be the case that customers are not aware of such data collection, because the design of the software architecture and digital designs used are often very well thought out, making such data collection virtually unintentional. Therefore, it is important for companies to implement ethical and responsible strategies in terms of data collection for further processing (Pangrazio & Selwyn, 2019). This should be one of the priorities for companies.

## **METHODOLOGY**

The methodology used in this research work is the case method. This is a tool constantly used in social science studies where the aim is to analyse a problem by means of a real case. This method develops a high linkage between the literature studied and presented and the results of the study. Also, it provides answers to such important questions as “why” and “how”, mostly harbouring a casual mechanism.

This methodology will attempt to verify the hypothesis on the relationship between the digitalisation of the traditional restaurant order chain and the improvement of digital marketing strategies.

The choice of this methodology is motivated by the strength of this methodology for analysing projects or management chains in an efficient way and answering the questions set by the researchers in their initial objectives. This methodology allows for flexibility in the study, which allows for a more personalised analysis of each case. (Rasnacis & Berzisa, 2017).

## **THE CASE OF THE RESTAURANT RINCÓN MANCHEGO**

In this work, a methodological analysis of the case of the Restaurant Rincón Manchego has been carried out. In order to further study the management of the digitalisation of the order chain and how this helps the implementation of marketing strategies in restaurants that do not belong to franchises or large hospitality chains.

The choice of Restaurant Rincón Manchego is motivated by the fact that it is a restaurant that has been progressively implementing the digitalisation of its production chain since 2016 and that, together with other resources for obtaining information, has enabled it to design marketing strategies that are more effective.

Rincón Manchego is a restaurant located since 1970 in the historic town of Chinchilla de Monteargón in the province of Albacete. Currently (as of May 2021) it has 14 employees, is a small company size (based on number of employees and total assets) and has been operating in the market for 52 years without interruption. It specialises in traditional Manchegan food and has become a reference point at provincial level both for its cuisine and for its careful Manchegan aesthetics. The building emulates an old Castilian inn with a wooden balcony on the outside and rooms decorated with a multitude of historical elements from the last century that are indigenous to the area.

In 2015, the restaurant’s management decided to implement a fully digitalised ordering system to solve some of its problems and to be able to implement new product lines demanded by some of its customers.

The main motivation came about because the establishment has a menu with some 220 items, most of which are 100% prepared in the kitchen. Dishes such as Ajo de Mataero, Atascaburras, Migas Ruleras or Patatas Bravas Rincón Manchego are highly elaborated and take a long time to serve. The aim was also to manage table service more efficiently by trying to reduce the time taken for beverage service and final payment service. It is the latter that generated the most complaints from customers, as the average time to settle the bill and manage the collection was 10 minutes. Apart from other problems such as the anxiety generated in the kitchen staff or the numerous mistakes in the ordering process in the kitchen, the management also wanted to implement a new line of business. His new line was based on the production of products to be consumed at home.

*Figure 1. Front of the restaurant Rincón Manchego*

*Source: own elaboration*



### **Implementation of Digitalisation in the Ordering Process of the Rincón Manchego Restaurant**

The digitisation process of the ordering process was not easy for the Rincón Manchego restaurant as it had several problems to solve before the implementation. All their order management was practically manual, except for the last one where the account was done with a cash register, the whole process was done in a traditional way. The same waiter served the table from start to finish without any other waiter entering his service. The order was written down in a notebook with a pen and sung loudly in the kitchen. With the disadvantage of having several colleagues doing the same process and with a menu that had numerous references.

The first process was to modify the entire service and kitchen management structure. To adapt it as much as possible to the structure that the order management would have once it was digitised.

The first process was to modify the entire service and kitchen management structure. To adapt it as much as possible to the structure that the order management would have once it was digitised. It was decided to do the process in two steps so as not to create a collapse. First of all, we started working with

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tracing paper, where the waiter would no longer say the order by voice, but would leave a note. Kitchen management changed. Before, each member of the kitchen had their own position and worked independently, now there would be a person in charge who would call out all the orders in order of arrival. And the entire kitchen team would work in synchronisation as the person in charge would be giving orders.

With the tracing process, time was saved as the waiters did not have to repeat the same order numerous times. This change allowed them to dedicate this time to providing a better service and being able to attend to more customers. But more importantly, the main problem for the digitisation of the ordering process had been solved.

Once the fully digitalised order management system has been implemented in the restaurant. Further changes had to be made in the restaurant's personnel management, but this time in the dining room service. In this case, the functions of several waiters had to be changed. This would change from the same employee managing the table from start to finish, to having the beverage service and the cashiering service performed by another employee.

In the digitalisation process, waiters were equipped with PDAs and printers were installed to print out orders in the kitchen as well as in the preparation of drinks. From that moment on, the waiter takes note of the order with the PDA and sends the information to three places automatically: to the central computer, which is responsible for storing the data and what the diners are consuming; to the kitchen, which sends all the kitchen references and to the beverage preparation section, which sends the beverages. While the employee continues to wait on other tables, other wait staff serve drinks and the kitchen staff prepare the dishes.

The modifications to personnel management and digitisation of the order process started to show positive results from the first day it was installed. Errors due to problems in the communication channel between the dining room and the kitchen were almost completely eliminated. The average time to charge customers was reduced to around 8 minutes per ticket. The control over the products sold and collected is virtually complete, avoiding losses due to lost products. However, the most striking fact for the restaurant's management was that the turnover of customers in the lunch and dinner services increased by almost 50%. By digitising the entire service, service downtime was almost completely eliminated, which meant that more customers could be served as their time in the shop was considerably reduced.

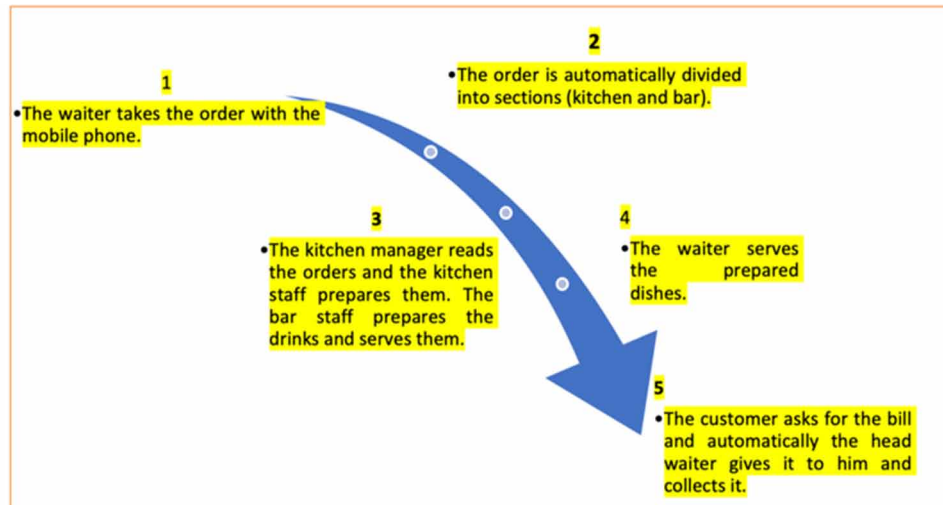
The digitalisation of order management also opened up a new line of business. The installation of order management software also made it easier to manage orders to be picked up at the establishment and consumed at home. The high demand for this service could be met thanks to the digitisation described above.

The implementation of the digitised ordering system not only improved the restaurant's production chain, but also substantially improved different areas of the family business. Being able to access important information about the restaurant at the touch of a button made management tasks much easier. The accounting and finance area reduced its working time as much of the company's financial information was collected and sorted on a daily basis using the management software. Office work was eliminated as customer invoices were now done on the spot. The purchasing department knew at all times which products had been sold and therefore facilitated warehouse control. In the case of marketing management this changed drastically, having relevant information about, demands, times, products consumed, time schedules, etc. It caused marketing strategies to change and adapt.



**Figure 2. Evolution of the digitised order chain.**

Source: own elaboration based on (Prado-Román & Nebreda, 2018)



## Digital Marketing Strategies in the restaurant Rincón Manchego

Improving the restaurant's marketing strategies was not seen as one of the driving forces behind the digitisation of the order chain. But when it was realised that the information collected through the management software was relevant to this issue, everything changed.

The digitalisation of the restaurant made it possible to obtain various data: Products sold, sales time slots, associated products, means of payment, etc. This, together with the information that could be obtained from social networks, booking channels, the establishment's website and Google Business, was a valuable source of value. But it was not until the end of 2019 that this data was used to manage the restaurant's marketing strategies.

Strategies became mostly digital. Advertising in the press, tourist magazines, travel guides, were suppressed. Radio advertising was reduced to a minimum, only contracting advertising on very special occasions. Contributions to associations, sports clubs, etc. were also reduced to a minimum. The strategies were modified and implemented on the basis of the information gathered from the different data sources.

This data is also collected from online booking sites, e-WOM portals and the restaurant's own website. Data collection in the latter has increased since the start of the pandemic. Due to the need to eliminate physical menus, it was decided to digitise the menu and the menu of the day and install QR codes throughout the restaurant for customers to enter the website. Visits to the website increased substantially compared to the previous year's results. This will lead to a substantial improvement in the natural positioning in Google.

Social media strategy is also supported by data-driven information. Publications are designed taking into account the type of product sold in each time slot or day of the week. The data itself obtained hours after from the publication shows how the publications trigger a desire to buy in customers. As part of the same social media communication strategy, financial support is given at specific times to some of the publications so that they can be more widely disseminated. Such support is focused by segmenting the population, taking into account which population group we want to target. The media strategy has

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also changed. Now they do not hire traditional advertisements to promote themselves, but participate in a different way in various radio and television programmes.

The results of the digitisation of the order chain and its influence on digital marketing policies have been very positive for this company. It is worth to point out that its adaptation to the pandemic and its survival is thanks in part to the versatility that digitisation gives it. The restaurant's staff has increased by 20% since 2016. They have been able to increase the number of items on the menu without being disruptive. Their communication policies are much more effective and more economical. The positioning on tourism websites, booking pages and google has improved substantially. The costs for losses in the preparation of services have decreased as there is a history of sales.

The following table shows the advantages and disadvantages of digitalisation in the restaurant Rincón Manchego:

*Table 1. Main advantages and disadvantages of digitisation in Rincón Manchego*

<b>Advantages</b>	<b>Disadvantages</b>
Increase effectiveness	Higher cost at the time of digitisation
Improving the quality of service	Difficulty in changing and getting used to a new system
Low cost after digitisation	Staff training
Competitive advantage over competitors	Dependence on technology
Improving Marketing strategies	

Source: own elaboration

As we can see from the table, digitisation in the restaurant industry has brought numerous advantages, among them the effectiveness of operating, reducing the time of passing information and improving competitiveness in the local market.

## **CONCLUSION AND IMPLICATIONS**

The implementation of digitisation systems in the order chain in the hospitality industry helps to improve performance and increase the company's chances of survival. This digitalisation generates a series of information that, together with other sources such as social networks, booking portals, e-WOM portals, websites, etc., allows traditional restaurants with a family business structure to carry out much more focused marketing strategies with a greater chance of success.

Data collection allows to know what the customer wants, how they want it and when they want it. Therefore, by means of specific advertisements it is possible to promote the consumption of a product or a reminder to reserve a table for specific days.

Therefore it can be stated that the digitalisation of the order chain in traditional restaurants influences the improvement of marketing strategies.

But not only in the improvement of marketing strategies is the advantage for this business. The collection and processing of data through the order chain of traditional food restaurants allows for improvements in many other areas of business management. Knowing what the customer wants and when he wants

it helps to better organise the restaurant's resources. Important issues such as personnel management, purchasing management or financial planning make the collection of information through the digitisation of the order chain one of the current points to be taken into account for a hospitality company. Not to mention its influence on delivery management, helping to improve planning and management as well as the location of potential customers.

There are many managerial implications that can be drawn from this study, which can be extrapolated to other types of restaurants, with different types of cuisine or different customer approaches. Having a greater impact on fast food lines of business. Where marketing strategies are crucial and where data collection at the order line is easier to collect.

An establishment that knows the preferences of its customers can make personalised offers, as well as offer them discount coupons if they have not shopped in the establishment for a long time. Another important managerial implication is that if we know the sales history and what social casuistry happened in those days, a replication of events can be provided. For example, if we look at the history, we can see that at the end of each month, the consumption of more expensive dishes decreases at the end of the week. Therefore, it would be possible to make an advertising campaign, where on the last Friday of each month, special mention is made of the cheapest products to promote their sales even more.

As for the limitations of the study, it can be considered that the business is located in a non-franchised region of Spain. This implies that the strategy of this business may have slight modifications depending on the region or country where the facts are analysed. Another limitation is the non-existence of previous studies of this company, which means that at certain times part of the study may be poorly justified with data from the company analysed.

Finally, the future lines of research that this study has led to are diverse and very interesting. First of all, it would be better to re-analyse the company over a period of 1 or 2 years and see how it has evolved in terms of digitisation, to see whether this digitisation is the result of a modernization strategy or whether, on the contrary, digitisation was forced by the effects of the pandemic and the need to adapt in order not to die.

Secondly, it would be good to analyse in the same way other family-run hospitality businesses in different regions of Spain to know if digitalisation is being introduced in the same way, as well as to apply such a study in restaurants with different characteristics, such as fast food, luxury restaurants, etc.

Finally, it would be very helpful to conduct interviews with both customers and staff to find out their views on the advantages and disadvantages of digitisation in family-owned hospitality businesses.

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## KEY TERMS AND DEFINITIONS

**Digital Marketing:** Digital marketing is the use of technologies to help marketing activities in order to improve customer knowledge by matching their needs.

**Digitalisation of the Restaurant:** It is the implementation of technological systems for the management of the company. Transforming its operations and processes in order to achieve a specific benefit. This implies a redesign of the business model in order to make it more efficient.

**Artificial intelligence:** It is the combination of structured algorithms in order to create machines that have human-like capabilities to make decisions.

**Marketing strategies:** It is the style and method used to create sales opportunities. Its purpose is to place and position the products and services of a company in the most efficient way possible around the market niche to be covered.

**Big-Data:** It is a process that analyzes and interprets large volumes of data, with or without structure. This process is used so that the data stored can be used to make decisions.

# Chapter 13

## Personal Brand Benefits of Social Media Use for Researchers: A Case Study

**Alberto Prado Román**

*Rey Juan Carlos University, Spain*

**Iria Paz-Gil**

 <https://orcid.org/0000-0003-3696-5253>

*Rey Juan Carlos University, Spain*

**Miguel Prado Román**

*Rey Juan Carlos University, Spain*

### ABSTRACT

*Social networks are a very relevant tool for businesses to connect efficiently with many users at the same time. It means that in the second decade of the 21st century, companies have strengthened their strategies to expand their influence. In the higher education context, social media can help develop teaching strategies. Nevertheless, are they also relevant to expanding the professional capacity of researchers? Given this, this research aims to determine whether they are relevant within the research field and how they use them according to the researchers' position and the professional objectives set.*

### ORGANIZATION BACKGROUND

In a volatile market like the current one, understanding users is fundamental to determining their preferences to adjust brands' services and products (Nieto, 2015). However, users' behavior is affected by objective, psychological (Gómez & Prado, 2014), or subjective factors, as the impact of the publication of a news item on users (Fisher & Statman, 2000). Furthermore, this increases with the emergence of

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social networks in the 21st Century, which has had significant relevance in consumers' behavior (Owyand & Toll, 2007; O'Connor et al., 2008; De Moya & Jain, 2013; Pérez, 2017).

The constant evolution of the market has caused traditional communication channels to manage the well-known web 2.0 (Martínez & Sánchez, 2015). The relevance and evolution of digital networks are undisputed. They are considered meta-media both for their digital characteristics (navigation, search, reading, interaction) and presenting different multimedia content (Jensen, 2013; Campos Freire, 2015a).

Digital development allows meta-media to keep its basis on traditional markets' main characteristics but making continuous evolutions implementing simple innovations for users (Manovich, 2005). Among them, social networks have a relevant impact on the communication market (Manovich, 2008).

Social networks (arising from Web 2.0) are now powerful communication platforms: allow interaction between millions of users, thus becoming relevant media ecosystems (Beer, 2008; Stenger 2009; Campos Freire, 2015b). However, it is necessary to point out that social networks' germane impact on the communication sector relies on both tangible and intangible society's dynamic exchanges (Allee, 2009).

Therefore, traditional media and meta-media have become a fundamental part of companies' communication strategies (Carpentier, 2016).

Due to it, organizations expand their interest in social networks regarding the evolution of their role in communication channels (Barthel et al., 2015). Companies increasingly rely on mobile communication strategies to significantly impact users through social networks (Mitchell & Page, 2015). So much so communication managers have increased since 2010 their strategies to improve their impact within social networks (Lasorsa et al., 2011; Paulussen & Harder, 2014).

On the one hand, social networks have outstanding benefits to improve communication and interaction within a vast number of users simultaneously. On the other, they also present significant challenges requiring companies to make critical adjustments in their communication strategies (García, 2013). For this reason, their efforts have to focus on presenting content that allows them to capture and maintain their audience's loyalty (Lee, 2015).

Besides, social networks have been used from the educational framework's perspective, demonstrating that their use in teaching improves students' perception (Alonso & Muñoz de Luna, 2010). Therefore, students can assimilate the technological and communicative skills for dynamic markets (De la Torre, 2009). Also, the networks favor students' interaction, allowing the real-time sharing of information, which facilitates teamwork (Gómez et al., 2012) and a more dynamic work environment (Imbernón et al., 2011).

Despite the research on using social networks in the communication sector, there is no evidence about how they can help researchers generate professional agreements. It is in this scenario that the relevance of this research lies. Accordingly to Saura (2021), some of the researchers' challenges have to do with extracting knowledge from the digital environment. Furthermore, knowing how to use social media for boosting a professional career in the higher education field is still misunderstood. Therefore, the main objective of this research is to determine the use and implications of social networks within the universities' teaching and research staff. For it, the authors designed and applied a survey to identify the most used social networks. Moreover, the respondents' social media use, including achievements' promotion and professional management, like creating agreements, contracts, publications, or others.

This case study explores how does Spanish faculty use social media for a professional purpose. For that, the structure of this chapter follows a case study one. In the first place, the organizational background sets the scope of the research, that is, to know if the researchers benefit from using social media in the professional field. The next part frames the case in the previous literature. Following that, the case description provides information about how the methodology is developed, containing a subpart



that analyzes the managerial and organizational concerns derived from this research. Then, the current challenges related to the researcher's personal brand are discussed. The chapter ends with the solutions and recommendations based on the case study, followed by the references and the key terms and definitions. In addition, the chapter is completed with the teaching notes files, which contain questions and answers, epilogue and lessons learned, and additional resources for deepening the topic.

## **SETTING THE STAGE**

Traditionally, communication strategies had a triple perspective: press, television, and radio. However, over the years, it has become more hermetic in the face of social demands (Jerez et al., 2000). Users cannot participate in the official media contents (Humphreys, 1996), causing a disconnection feeling.

The technological evolution of recent years and the birth and development of the internet have led to a new technological and social framework, causing the constant emergence of new digital relationship platforms (Martínez & Sánchez, 2015).

From a group perspective, social networks are highly relevant in collective action (Della Porta et al., 2009; Carty, 2010), allowing creating relevant events in minutes (Reinghold, 2004; Sádaba, 2012). So it is essential to maximize existing resources, as is the case of digital platforms (Puricelli, 2005). Therefore, social networks have caused an evolution in the communication paradigm (Rovira, 2012).

In this scenario, social networks have become a communication channel with exponential transmission speed, allowing reaching large groups of users that traditional channels do not achieve (Candia, 2014).

As a result, social networks have become new communication models in which it has been necessary to deepen these networks' functioning (Boyd & Ellison, 2007) and the methodologies applied within social networks (Carrington et al., 2005). Nature and relationships that take place between users have also been deepened (Hargittai, 2007). Since their creation, they have been used to analyze political movements, both from the perspectives of theoretical studies and significant case studies (Tilly, 2005; Tilly & Wood, 2014). However, many of the digital group communications within social media are not supported by society's collective values but by users' desire for transgression (Lasén & Martínez, 2008).

Therefore, it is essential to identify users' interacting within social network motivations (Gangadharbatla, 2008), these interactions' impact on their behavior (Christakis & Fowler, 2009), and the possible results derived from their use (Kim et al., 2014).

If it is necessary to highlight some social networks, Facebook and Twitter are the two most used from the digital market's research perspective (Montero, 2018).

The studies that focus on Facebook aim to identify users' type (Sun et al., 2009), its possibilities, and its influence on users (Kirkpatrick, 2010). Besides, other approaches highlight the use of the social network from the journalistic sector's perspective in different countries (Noguera, 2010; García de Torres et al., 2011; Bakshy et al., 2012; González & Ramos, 2013; Mitchell & Page, 2015).

The research on Twitter analyzes users' comments on events, being this analysis a new methodology (Bruns & Burgess, 2011), or its role as a news communication channel (Hermida, 2013; Larsson & Hallvard, 2015; Arrabal & De Aguilera, 2016).

If the focus is on the digital business scenario, the arrival of new technologies has forced companies to look for new horizons in the market to ensure their sustainability (Aras & Crowther, 2010; Miron et al., 2011; Millar et al., 2012). Companies must ensure that users validate their behaviors to guarantee their future activity (Schau & Gilly, 2003; Ritter, 2009; Celaya, 2008). Therefore, a change of business

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paradigm is needed since, in the 1980s, intangible assets represented 35% of companies (Kendrick, 1994), while in the 21st Century, they represented 70% (Daum, 2002).

Based on the above, it has been determined that companies do not only use social networks as platforms for recreational content but to efficiently manage businesses to ensure customers a complete experience (Luque & Castañeda, 2007). Previous has allowed service companies to ensure an evolution in their services' quality compared to users (Martínez et al., 2013). In fact, within the hotel sector, the leading chains use Facebook as a tool to determine the behavior of users (Beltrán et al., 2017).

It is worth mentioning that social networks play a fundamental role within the organizational sphere. They allow expanding and improving employees' skills (Dyer & Nobeoka, 2000) since the level of learning cannot be solely focused on an isolated organizational framework such as the company (Argote, 1999). Therefore, companies need to consider the relationships between them and their environments (Uzzi & Lancaster, 2003), thus increasing their learning level and productivity (Baum et al., 2000).

Furthermore, the digital environment allows the company to create communication flows. It means reinforcing their contacts' networks (providing a greater transference and combination of knowledge), thus improving their results (Ingran & Roberts, 2000). Moreover, creating managerial networks with other companies allows them to streamline their respective selection processes and performance (Collins & Clark, 2003).

Therefore, both companies and users must manage social networks efficiently in such a dynamic market, because it allows collaborative work and the exchange of information regardless of where they are (Fliaster & Spiess, 2008), as well as identifying new challenges and their corresponding solutions (Kijkuit & Van den Ende, 2007).

The added value of this study case relies on exploring how the researchers use social media to get professional opportunities. Moreover, this research shows which social media are best indicated for getting different opportunities depending on the type of activity (scientific publications, conferences, teaching, and mobility, or contacts network), or on the academic category (professor, associate professor, assistant professor, or others; see tables 4 to 11).

## **CASE DESCRIPTION**

This study case analyzes the faculty of Spain's Universities. Despite the relevance of social media in the communication sector is clear, there is not enough scientific evidence on whether social media can facilitate professional agreements within the faculty.

To present, analyze, and discuss this case study the researchers use the academic staff's USA names, followed by the Spanish ones (table 1).

The collection data method is a survey to test the study's validity and determine the possible relevance of social networks in Spanish Universities' faculty's employment development. The questionnaire was distributed online following the snowball sampling technique, a non-probabilistic sampling technique where the first subjects selected share the questionnaire among referrals (Baltar & Brunet, 2012) (available at <https://www.encuestafacil.com/respweb/cuestionarios.aspx?EID=2721351&MT=X>).

The data collection process takes place between February and March 2021. The months chosen to launch the survey and collect data are justified because the academic year is in the middle of its development. This scenario allows the faculty to focus its efforts on other tasks in place of the strictly academic

*Table 1. Equivalences in academic staff in Spain, USA, and UK (adapted from Morales, 2016)*

Spain	USA	UK
Catedrático de Universidad Catedrático de Escuela Universitaria	Professor (full)	Professor
Profesor Titular de Universidad Profesor Titular de Escuela Universitaria	Associate Professor (tenured)	Senior Lecturer
Profesor Contratado Doctor	Associate Professor (tenured)	Lecturer (permanent position)
Profesor Titular de Universidad Interino Profesor Titular de Escuela Universitaria Interino	Associate Professor (tenure track)	Lecturer (fixed term contract)
Profesor Contratado Doctor Interino	Associate Professor (tenure track)	Lecturer (fixed term contract)
Profesor Ayudante Doctor	Assistant Professor	Lecturer (fixed term contract)
Profesor Visitante	Visiting Professor	Visiting
Profesor Asociado	Adjunct Professor	Associate Lecturer

ones, such as the use and updating of their social networks. The survey circulates among researchers from the different universities that carry out their functions in Spain.

The questionnaire begins with a control-question. This question allows differentiating the academic staff who use social networks, the study's target, from the rest of the respondents. Upon the control-question follows a block of questions addressed to know the respondents' use of social media. The questions aim to reveal how does faculty use social media and the benefits they obtain. In other words, if faculty follow a researcher's brand strategy. Finally, the survey ends with a block of demographic questions. The demographic questions mainly focus on identifying the faculty respondents' job profiles to determine the relevance of social networks' use according to their university position.

The sample consists of 313 surveys, of which 108 are considered valid for the research. The selected sample consists of both men (51%) and women (49%), predominantly respondents whose age range is between 30 and 64 years (87% of the sample). The sample provides a complete overview of social media's importance for faculty. It covers almost 50% of both researchers with permanent job status at university (tenured positions, 51%) and researchers with non-permanent job status (non-tenure positions, 49%). The predominant faculty groups are Associate Professor, tenured (Titular de Universidad) (22%), and Associate Professor, tenured (Profesor Contratado Doctor) (20%).

Finally, after collecting the data, the actual relevance of social networks for university faculty is analyzed, identifying different relevance levels according to their university's working position.

## **Management and Organizational Concerns**

After completing the data collection process, starts a process of analysis of the results obtained in the study of social media's relevance in the development of faculty activity.

The results reflect a great use of social media as relevant tools in developing and disseminating their research (more than 73% of faculty have researcher profiles on social media). However, the use of personal web pages is scarce. A priori was considered a relevant media, but only 15% of the respondent faculty own a web page. This result indicates that the researchers do not consider helpful having a website, despite it being a way to centralize the researchers' studies and build a researcher brand. It may be due

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not to the consideration of difficult to develop mechanisms but to disseminating the researchers' studies through social media more efficiently. A researcher who wishes to use his/her website to spread his/her research and professional activities will have to make a great effort in its diffusion. For this, the researcher must communicate the contacts the constant work updates using links that he/she needs to upload to the social media in which he/she has a researcher profile. By performing this task, the researcher might find that he/she could perform the same broadcast tasks without constantly updating his/her web page. Thus, the researcher may understand that he/she would not be focusing his/her efforts properly. On the contrary, using social media could probably reach better his/her research dissemination objectives. This reason would justify the scarce use of own websites, elements of centralization and dissemination of publications, works, and other research activities, and the high use of social media for these purposes.

Regarding the use of social media by researchers, two social networks stand out above the rest (table 2), ResearchGate (74.23%) and LinkedIn (69.07%). The use of LinkedIn by a high percentage of the surveyed faculty may be due to its nature. This social network was born to put professionals and companies in contact, seeking to generate synergies and job opportunities between them. Thus, one of the great benefits of using LinkedIn is generating a contact network among professionals. Nevertheless, this benefit is due to its purpose, so, understandably, the most used network to develop different scientific activities is ResearchGate. This social network, unlike LinkedIn, has a researcher profile that better fits the development of the scientific activities. For all this, the high use of both social networks is comprehensible. They are complementary and provide benefits to the researcher that allow him/her to develop and disseminate his/her research activity and generate new research opportunities. Besides, the use of the Publons network is not too high (38.14%) among researchers, but this may be due to the academic nature of the network itself, compared to the research nature of ResearchGate. These results give an insight into that, even though the different social media are relevant according to the advantages derived from its own nature, for the academic staff, this becomes essential. They can complement their use with networks that allow generating a high network of contacts.

*Table 2. Identification of social networks in which researchers have a research profile (own elaboration)*

<b>Social Network</b>	<b>Research Profile</b>
ResearchGate	74,23%
LinkedIn	69,07%
Publons	38,14%
Twitter	15,46%
Facebook	9,28%
Instagram	8,25%
Tuenti	1,03%
Other	8,25%

Regarding the relevance of social media for the development of researchers' scientific activity, the results reveal that researchers mostly understand that social media is critical to ensure the successful development of their scientific work (table 3). Thus, almost half of the respondents (49.48%) understand that social media is fundamental both for the development and dissemination of their research,

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and 22.68% understand its relevance. However, they do not stand out so much. Only a tiny percentage (7.22%) do not understand the essential role of social media. It is important to note that social media's relevance not only helps in the dissemination of the faculty's professional activities. It also allows contacting other researchers to improve their research techniques, develop data collection techniques, or establish future collaborations.

*Table 3. The relevance of social media to the development of researchers' professional activities (own elaboration)*

Social media use assessment (from 1, the less important, to 5, the most)	Researchers' Assessment Percentage
1	7,22%
2	20,62%
3	22,68%
4	24,74%
5	24,74%

Next, to analyze the benefits of using social media for the faculty, the study divides the sample according to their respective universities' relative positions. The approximated equivalences among Spain, the USA, and the United Kingdom faculty are available in table 1. The professional activities rely on four main areas: scientific publication opportunities, holding conferences and similar, teaching and mobility opportunities, and contacts networks growth.

University Professors (Catedráticos de Universidad) and University School Professors (Catedráticos de Escuela Universitaria) (table 4) obtain a significant benefit in the form of publications in scientific journals and books. However, not through all social media, since to obtain these benefits, they mainly use ResearchGate (40%), although they also use LinkedIn (20% publication of journals, 30% publication of books), and Publons (30%). Regarding holding conferences and teaching and mobility opportunities, they opt for LinkedIn (40% holding congresses, 40% teaching courses, seminars, masters, or other). These are very consistent results due to the social media's professional and researcher nature (LinkedIn and ResearchGate, respectively). Finally, to increase the contacts' network, both national and international, University Professors and University School Professors use LinkedIn (30% and 40%, respectively). This social network can increase their national and international contacts, both professional or more investigative.

Associate Professors (tenured) (Titular de Universidad and Titular de Escuela Universitaria) (table 5) obtain a significant benefit in the form of scientific publications in journals and books. These benefits come from ResearchGate (39% publications in journals, 32% publications in books) and LinkedIn (28% publish in journals, 21% publish in books). Regarding holding conferences and teaching and mobility opportunities, they opt for LinkedIn (21%). These are very consistent results due to social media's professional and researcher nature (LinkedIn and ResearchGate, respectively). Finally, to increase the contacts' network, both national and international, Associate Professor (tenured) (Titular de Universidad and Titular de Escuela Universitaria) use ResearchGate (50% and 46% respectively) and LinkedIn (46% and 36% respectively). This social network can increase their national and international contacts, both professional or more investigative.

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*Table 4. Analysis of the relevance of social media in the development of professional activities of university professors and university school professors (Catedráticos de Universidad and Catedráticos de Escuela Universitaria) (own elaboration)*

Professional activity	ResearchGate	LinkedIn	Publons	Twitter	Facebook	Instagram	Tuenti
Journal publications	40%	20%	30%		20%		
Book publications	40%	30%	30%	10%			
Holding conferences	10%	40%	10%		20%	20%	10%
Holding seminars	10%	20%			20%	10%	10%
Teaching courses, seminars, master's degree, or others	20%	40%	10%		10%		
Improving the contacts network nationwide	30%	30%	20%		10%	10%	
Improving the contacts network worldwide	30%	40%	10%		10%		

*Table 5. Analysis of the relevance of social media in the development of professional activities of associate professor (tenured) (Titular de Universidad and Titular de Escuela Universitaria) (own elaboration)*

Professional activity	ResearchGate	LinkedIn	Publons	Twitter	Facebook	Instagram	Tuenti
Journal publications	39%	28%	18%	7%	11%	3%	
Book publications	32%	21%	14%	7%	7%	3%	
Holding conferences	7%	21%	3%	14%	14%	3%	
Holding seminars		21%		11%	11%		
Teaching courses, seminars, master's degree, or others		21%		14%	11%	3%	
Improving the contacts network nationwide		11%	14%		3%	25%	50%
Improving the contacts network worldwide		11%	11%		7%	25%	46%

Associate Professors (tenured) (Profesor Contratado Doctor) (table 6) obtain a significant benefit in the form of scientific publications in journals and books. These benefits come from using ResearchGate (52% publications in journals, 40% publications in books) and LinkedIn (28% publish in journals, 32% publish in books). Regarding holding conferences and teaching and mobility opportunities, they opt for LinkedIn (20% holding conferences, 28% holding courses, seminars, masters, or others). They also use LinkedIn to generate opportunities to teach courses, seminars, masters, or other (40%). These results continue to be consistent due to these social networks' professional or researcher nature (LinkedIn and ResearchGate, respectively). Finally, to increase the contacts' network, both national and international, these faculty group uses ResearchGate (44%) and LinkedIn (48% and 44% respectively). Thus, they can increase their network of national and international contacts, both professional or more investigative.

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*Table 6. Analysis of the relevance of social media in the development of professional activities of associate professor (tenured) (profesor contratado doctor) (own elaboration)*

Professional activity	ResearchGate	LinkedIn	Publons	Twitter	Facebook	Instagram	Tuenti
Journal publications	52%	28%	14%	8%	4%		
Book publications	40%	32%	14%	4%			
Holding conferences	16%	20%		8%	4%	4%	
Holding seminars	16%	28%		12%		8%	
Teaching courses, seminars, master's degree, or others	12%	40%		12%	8%	4%	
Improving the contacts network nationwide	44%	48%	4%	14%		4%	
Improving the contacts network worldwide	44%	44%	4%	4%		4%	

Associate Professors (tenure track) (Profesor Titular de Universidad Interino and Profesor Titular de Escuela Universitaria Interino) (table 7) obtain a significant benefit in the form of scientific publications in journals and books. These benefits come from using LinkedIn (43% publication of journals, 71% publication of books). Regarding holding conferences and teaching and mobility opportunities, they opt for LinkedIn (71% holding congresses, 57% holding courses, seminars, masters, or others). They also use LinkedIn to generate opportunities to teach courses, seminars, masters, or other (57%). The results show that social media has an outstanding professional character for this faculty group since they do not opt for social media of a more investigative nature, such as ResearchGate. Finally, to increase the contacts' network, both national and international, they seek to expand it more in the profession than in the researcher field. They mostly choose to use LinkedIn (71% network of national contacts, 57% network of international contacts).

*Table 7. Analysis of the relevance of social media in the development of professional activities of associate professor (tenure track) (Profesor Titular de Universidad Interino and Profesor Titular de Escuela Universitaria Interino) (own elaboration)*

Professional activity	ResearchGate	LinkedIn	Publons	Twitter	Facebook	Instagram	Tuenti
Journal publications		43%		14%	28%		
Book publications		71%				14%	
Holding conferences		71%					
Holding seminars		57%					
Teaching courses, seminars, master's degree, or others		57%					
Improving the contacts network nationwide		71%			14%	14%	
Improving the contacts network worldwide		57%		14%	28%		

### Personal Brand Benefits of Social Media Use for Researchers

Associate Professors (tenure track) (Profesor Contratado Doctor Interino) (table 8) obtain a significant benefit in the form of scientific publications in journals and books. These benefits come from LinkedIn (85% publication of journals, 38% publication of books). Although unlike the Associate Professor (tenure track) (Profesor Titular de Universidad Interino and Profesor Titular de Escuela Universitaria Interino), they choose to use ResearchGate to improve the management of their publications in scientific journals and books (31%). Regarding holding conferences and teaching and mobility opportunities, they opt for LinkedIn (23% holding conferences, 69% holding courses, seminars, masters, and others). They also use LinkedIn to generate opportunities to teach courses, seminars, masters, or others (85%). The results show that social media has an outstanding professional character for this faculty group since they do not opt for social media of a more investigative nature, such as ResearchGate, to hold or give conferences, courses, seminars, masters, or similar. Finally, to increase the contacts' network, both national and international, they seek to expand it more in the profession than in the researcher field. They mostly choose to use LinkedIn (92% network of national contacts, 92% international contacts network). They choose to use ResearchGate to increase their national (15%) and international (23%) contacts network. In this way, they can increase their national and international contacts, both professional and more investigative.

*Table 8. Analysis of the relevance of social media in the development of professional activities of associate professor (tenure track) (profesor contratado doctor interino) (own elaboration)*

Professional activity	ResearchGate	LinkedIn	Publons	Twitter	Facebook	Instagram	Tuenti
Journal publications	31%	85%	15%				
Book publications	31%	38%	15%				
Holding conferences		23%			8%		
Holding seminars		69%			8%		
Teaching courses, seminars, master's degree, or others		85%					
Improving the contacts network nationwide	15%	92%					
Improving the contacts network worldwide	23%	92%					

Assistant Professors (Profesor Ayudante Doctor) (table 9) obtain a significant benefit in the form of scientific publications in journals and books. These benefits come mainly from using ResearchGate (38% journal publication, 38% book publication). Regarding holding conferences and teaching and mobility opportunities, they opt for LinkedIn (25% holding congresses, 13% holding courses, seminars, masters, or others) and ResearchGate (25% holding conferences, 25% holding courses, seminars, masters, or others). They also use LinkedIn (25%) and ResearchGate (25%) to generate opportunities to teach courses, seminars, masters, or others. These results continue to be consistent due to these social networks' professional or researcher nature (LinkedIn and ResearchGate, respectively). Finally, to increase the contacts' network, both national and international, this faculty group seeks to expand their contacts both at a professional and research level. In generating a national contacts network, they mainly use LinkedIn (38%) and ResearchGate (25%). In generating an international one, most use ResearchGate (38%) and LinkedIn (25%).



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*Table 9. Analysis of the relevance of social media in the development of professional activities of assistant professor (profesor ayudante doctor) (own elaboration)*

Professional activity	ResearchGate	LinkedIn	Publons	Twitter	Facebook	Instagram	Tuenti
Journal publications	38%						
Book publications	38%						
Holding conferences	25%	25%		13%		13%	
Holding seminars	25%	13%					
Teaching courses, seminars, master's degree, or others	25%	25%		13%		13%	
Improving the contacts network nationwide	25%	38%		13%		13%	
Improving the contacts network worldwide	38%	25%		13%		13%	

Visiting faculty (Profesor Visitante) (table 10) obtain a significant benefit in the form of scientific publications in journals and books. These benefits come from ResearchGate (33% publication of journals, 27% publication of books). It also stands the use of Publons to publish their articles in journals (27%) and LinkedIn for the publication of their articles in scientific books (20%). Regarding holding conferences and teaching and mobility opportunities, they opt for LinkedIn and Instagram (20% on both social media). They also focus on LinkedIn (20%) to generate opportunities to teach courses, seminars, masters, or others. The results obtained continue to be consistent due to the social media's professional or researcher nature (LinkedIn and ResearchGate, respectively). Finally, to increase the contacts' network, both national and international, this faculty group seeks to expand their contacts both at a professional and research level. In generating a national contacts network, they usually choose ResearchGate (33%) and LinkedIn (20%). In generating an international one, they use ResearchGate (33%) and LinkedIn (20%). Through these networks, they seek to increase their national and international contacts, both professional and researcher.

*Table 10. Analysis of the relevance of social media in the development of professional activities of visiting faculty (profesor visitante) (own elaboration)*

Professional activity	ResearchGate	LinkedIn	Publons	Twitter	Facebook	Instagram	Tuenti
Journal publications	33%	13%	27%				7%
Book publications	27%	20%	7%	13%		13%	
Holding conferences	13%	20%		13%		20%	
Holding seminars	13%	20%		13%		20%	
Teaching courses, seminars, master's degree, or others	13%	20%	13%	13%			
Improving the contacts network nationwide	33%	20%	13%	13%			
Improving the contacts network worldwide	33%	20%	13%	13%			7%

## Personal Brand Benefits of Social Media Use for Researchers

Adjunct Professors (Profesor Asociado) (table 11) show inferior results in obtaining benefits through scientific publications in journals and books. It is barely a slight benefit in publishing articles in books using LinkedIn (9%). Regarding holding conferences and teaching and mobility opportunities, even though the results point in the same line in terms of their relevance, LinkedIn (9%) is the chosen social media. They also use LinkedIn to generate opportunities to teach courses, seminars, masters, or others (9%). Due to the Adjunct Professor's labor nature, it is understandable that the social network most used is LinkedIn since it is a professional network. However, to increase the contacts' network, both national and international, this faculty group seeks to expand it both professionally and in research. For that reason, they choose to use LinkedIn (13% network of national contacts, 9% network of international contacts) and ResearchGate (9% network of national contacts, 9% network of international contacts).

Table 11. Analysis of the relevance of social media in the development of professional activities of adjunct professor (Profesor Asociado) (own elaboration)

Professional activity	ResearchGate	LinkedIn	Publons	Twitter	Facebook	Instagram	Tuenti
Journal publications							
Book publications		9%					
Holding conferences		9%					
Holding seminars		9%					
Teaching courses, seminars, master's degree, or others		9%					
Improving the contacts network nationwide	9%	13%					
Improving the contacts network worldwide	9%	9%		9%			

These results show the professional impact of professional social media use in researching activities. However, the relevance of each network varies among different faculty groups.

## CURRENT CHALLENGES FACING THE ORGANIZATION

In the past, companies based their communication strategies on the traditional media, although in recent years, society criticized the media's secrecy (Jerez et al., 2000). In response to this need, this scenario is where the new digital platforms emerge (Martínez & Sánchez, 2015). Social media becomes necessary to make multiple communications to thousands of users simultaneously (Beer, 2008; Stenger 2009; Campos Freire, 2015b), which requires companies to formulate dynamic communications to capture their interest (Allee, 2009).

Thus, companies design mobile communication strategies through social networks (Mitchell & Page, 2015) to increase user interest (Lasorsa et al., 2011; Paulussen & Harder, 2014). Besides, they also use them to improve their organizational vision within them by expanding their employees' knowledge and relationships (Dyer & Nobeoka, 2000) and the relationships between them and their respective environments (Uzzi & Lancaster, 2003).

The results of this study case are identified through the surveys conducted according to the different categories' preferences for the segments analyzed. It is noteworthy the participation of the permanent faculty, which represent 66.67% of the sample. Among them, University Professors (Catedráticos de Universidad) and University School Professors (Catedráticos de Escuela Universitaria) are the 7.94%, Associate Professor (tenured) (Titular de Universidad and Titular de Escuela Universitaria) and Associate Professor (tenure track) (Profesor Titular de Universidad Interino and Profesor Titular de Escuela Universitaria Interino) are the 28.57%, and Associate Professor (tenured) (Profesor Contratado Doctor) and Associate Professor (tenure track) (Profesor Contratado Doctor Interino) are the 30.16%. There is also significant participation of Visiting professors' faculty group, with 11.90% of the sample.

According to this study case's main objective, if the Spanish faculty uses social media for professional purposes, the results provide important insights. Thus, social networks are relevant to build a researcher's personal brand. Specifically, this use improves their vision and teachers (Dyer & Nobeoka, 2000) and increases their relations with the educational and business environment (Uzzi & Lancaster, 2003). However, although Facebook, Twitter, Instagram, or Tuenti are the main social networks in society, the use of none of them reaches 10%. In contrast, social networks such as ResearchGate (74.23%), LinkedIn (69.07%), ResearchID (41.24%), and Publons (38.14%) are the most used from the research perspective. So social networks significantly relate to the researcher's profile.

The results are widely distributed among the respondents to determine social networks' relevance in developing the researchers' professional activities. Among them, 49.48% of the faculty consider that having a researcher profile on social networks has a significant impact on their professional activities. In comparison, 22.68% consider that it influences mediumly. Only 7.22% consider that it has no relevance to generate new professional activities.

After proving the relevance of social networks on the researchers' activity, the next step consists of verifying if the respondent faculty has their website. The initial expectation was that the vast majority has a website. However, the results show the opposite since only 15.79% of researchers have websites to support their research.

Since the creation of social networks, just as companies use them to attract users' attention to the activities they develop (Lasorsa et al., 2011; Paulussen & Harder, 2014), researchers do. The faculty benefit from social media to build their personal brand and getting opportunities to increase their capacity to publish articles and other activities, such as holding congresses and seminars and organizing courses, seminars, or other scientific duties.

In developing the researcher's personal brand, the survey includes questions about four main areas: scientific publications, participation in conferences and similar, teaching and mobility opportunities, and contacts network growth.

Regarding the publications in scientific journals, faculty uses, in general, and in this order, ResearchGate, LinkedIn, and Publons. Nevertheless, in the case of book publications, they prefer LinkedIn, ResearchGate, and Publons.

In terms of holding conferences, faculty uses LinkedIn first and then reinforces Twitter and Instagram communication. When holding seminars, they also base their primary strategy on LinkedIn and focus then on ResearchGate and Instagram.

Concerning the teaching and mobility opportunities, faculty focuses on LinkedIn, then ReserachGate, and finally, other social networks more generalists like Twitter and Facebook.

Finally, social media use to increase the contacts network both in national and international areas partially differs. In both cases, faculty use more LinkedIn, followed by ResearchGate. However, it is the

third place where there are differences. In the national field, Publons is the most used network, while for the international is Twitter.

## **SOLUTIONS AND RECOMMENDATIONS**

This research has several implications. On the theoretical side, the study defines how the faculty can use social media to build a researcher's personal brand. Given the scarcity of previous research on this issue, this is an important contribution to help professional researcher's growth. This study also identifies which social media contributes best to getting different professional opportunities (scientific publications, conferences, teaching and mobility, and contacts network). On the practical side, researchers can use this study to determine which social media could better contribute to developing the professional activities they need to perform for their academic growth. Furthermore, they can use this research to identify the social network they should focus on to build a researcher's personal brand. Finally, scientific institutions, (i.e. universities), can use these findings to provide better conditions to their faculty, like publishing their achievements, announcing their activities, or boosting their online presence, among others, to help not only the researcher's development but also the institution's one.

According to the results, social networks have nothing to do with age or the position of researchers within the university. It depends on the strategy set by each of the researchers to achieve each of the previously set objectives.

This study case shows that it is highly recommendable that the faculty have a profile in social media. Depending on the stage and their interests, they should focus on the sectorial networks (ResearchGate, Publons). It is also essential to develop a researcher brand in LinkedIn to nurture the contacts network. All these activities will boost with the support of the communication on more generalistic social media.

In the scientific field, researchers must develop several facets for their professional growth. From management-related activities (i.e., academic positions) to teaching ones (i.e., giving lessons), research dissemination (i.e., conferences), and the research itself (i.e., exploring phenomena). In a hybrid society that shifts more to the digital environment, increased by global events like pandemic (Paz-Gil et al., 2021), researchers, like organizations, must have a presence on the Internet and take care of their personal brand. For that, social media are the most conductive platforms. Since privacy issues generated in the digital ecosystem should not be overlooked (Saura et al., 2021), one fundamental recommendation when developing a researcher's personal brand is establishing a clear distinction between the public and private profiles. Thus, preserving our privacy to minimize privacy loss.

The main theoretical and practical contributions of this research are that (i) it states the social media that the Spanish researcher uses the most, (ii) it shows the different activity areas that the different social media contribute the best for achieving professional opportunities, and (iii) the study clear that different academic categories use different social media.

During the research preparation, the main drawback is that the sample focuses mainly on researchers from Spanish universities. Along these lines, future research lines are intended to expand the sample of research to collect results from researchers from other countries. In this way, the next phase is to compare online dissemination strategies according to the researchers' nationality and teaching areas.

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## KEY TERMS AND DEFINITIONS

**Faculty:** The whole academic staff in the university. They usually develop academic activities, like teaching, or organizing courses or seminars, and researching ones, like developing scientific publications or holding conferences.

**LinkedIn:** LinkedIn is a social network addressed to put in contact professionals, both companies and employees. It gives job and career opportunities and has almost 700 million members all over the world.

**Meta-Media:** This term embraces the new communication meanings concerning the form, the contents, and their relations, in the development of new communications media and technologies.

**Personal Brand:** This concept refers to one person's fundamental characteristics that make him/her different and attractive to others. It is a common term in working contexts and implies the added value of the worker.

**Publons:** Publons is an academic, social network. Its focus is mainly on scientific publications. It has over 200.000 researchers and 25.000 scientific journals.

**ResearchGate:** ResearchGate is a scientific, social network. It hosts more than 19 million researchers worldwide of all the scientific fields and over 130 million scientific publications.

**Social Media:** Social media are online communication platforms in which their members also create content. They are based on Web 2.0 and social influence and interaction.

## Chapter 14

# Digital Customer Journey in the Luxury Hotel Experience: A Case Study Approach

**Jonathan Gomez Punzon**  
*Rey Juan Carlos University, Spain*

### ABSTRACT

*Digitalization is one of the biggest changes in our fast-moving world. There are a lot of digital innovations in many different industries, which are also affecting the hospitality industry. Taking into consideration that travel and tourism is all about the combination between a wide range of experiences and on-site benefits, the implementation of the digitalization in this industry is completely necessary. As a part of the travel and tourism industry, the luxury hospitality segment is continuing to grow more than what was expected, reaching figures of big spending and revenue regarding luxury hospitality bookings, and it is even expected to grow more than 60% by 2026. Luxury hospitality brands have a lot of upcoming opportunities to generate discussions through digital tools and innovations, not only about bookings, but also covering the whole customer journey.*

### INTRODUCTION

As a part of the travel and tourism industry, the luxury hospitality segment is continuing to grow more than what it was expected, reaching figures of big spending and revenue regarding luxury hospitality bookings, and it is even expected to grow more than 60% by 2026. Luxury hospitality brands have a lot of upcoming opportunities to generate discussions through digital tools and innovations, not only about bookings, but also covering the whole customer journey.

We cannot forget how sustainable luxury tourism and hospitality are also linked, improving the already mentioned figures of growing. When sustainability is linked to technology in luxury travel, it explains why consumers might react positively when learning that a luxury hotel is committed to sustainability. Amatulli, C., De Angelis, M., & Stoppani, A. (2021).

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It means that luxury hospitality brands can turn into a huge scalability of digital interactions providing maximization of the service with decreasing the cost for all the parts involved in the process.

These procedures accelerate changes in the industry from the current perspectives which were being established as for example cooperation or cooptation between luxury hotel groups and online travel agencies or online tour operators and intermediaries, undermining the buying power and the relevance of these intermediaries, avoiding their participation of the intermediaries which are currently taking a big piece of the cake through big commissions during the booking or selling process.

The digital transformation has completely affected the luxury hospitality industry and the challenge that this segment of the hospitality business has to face, is about how skilled will be this industry to transform their current on-site customer service procedures on providing high-level of quality, adapting them to the digital requests of the luxury hospitality client.

To embrace the new digital impulse initiated by the customers of the tourism and hospitality industry, it will be mandatory for the luxury hospitality brands to match these expectations on the digital interactions, which would be switched on increasing brands incomes, Hence, luxury hotel companies are moving to maximize the quality and the content of the digital journey.

Wealth travelers and wealth clients of luxury hospitality brands are always looking for immediate rewards and immediate sense of service quality, so their expectations during the digital interaction with the hospitality brand, are moving forward when it comes to perceiving that hospitality premium experience, no matter the moment of the customer journey the client is feeling: Inspiration, planning, booking, experiencing, or sharing.

Clients are willing to maintain the same rewarding perception all along the customer journey, and the client experience of the digital connections between the clients and the luxury hospitality brands, must be smoothly integrated, providing a seamless service experience.

Some researchers indicate that that optimism and technology innovativeness positively influence luxury hotel customer perceived value, and the customer perceived value when using technology innovations in the luxury hotel experience, positively influences customer satisfaction and customer purchase intention. Pham, L., Williamson, S., Lane, P., Limbu, Y., Nguyen, P. T. H., & Coomer, T. (2020).

Luxury hospitality brands are keen to keep themselves competitive within this industry through the digital channels.

Due to the inception of the democratization of technology, the luxury hotel brands are moving to implement a forward-thinking strategy on how they should approach to their digital clients of the luxury hospitality.

Since many other actors of the travel industry adopted the use of technology prior than luxury hospitality brands, this segment needs to take control of the client's conversations flow, in order to benefit their loyal clients making it easier for them to perceive the same benefits in values historically perceived from these brands.

When we are talking about clients, we can mention basically families Ann couples of affluent travelers and it is important to consider how the adoption of the technology among the younger generations are coming as novelty to take into consideration.

Some researchers provide findings highlighting a significant gap in how luxury hotel managers were managing the technological experiences of children under 12 years of age and that further incorporation of various touchpoints is needed to improve the management of the service design. Lahouel, B. B., & Montargot, N. (2020). We also have to take into consideration that no matter the group of age we are trying to reach through the technological interactions during the luxury hospitality experience, some

guests in clients they can provide fake reviews and comments to try to damage the reputation of the company for any given reason I see it happens in many different industries nowadays. Saura, J. R., & Punzon, J. G. (2020).

To do so, it is necessary to leverage an updated user generated content, becoming influential to create a digital community of clients looking for having immediate mobile conversations and interactions.

## **LITERATURE REVIEW**

Due to the COVID-19, the digital interactions became a day life task for luxury hotels all around the world, but there are some segments that are still struggling on moving the customers habits into a digital perspective. In this literature review we will have a look in today's growing importance of digital service luxury hotel companies.

Having a look on how researchers discuss about the technology implications through the different stages of the customer journey on the travel, tourism, and luxury hospitality industry, the literature review showcases interesting insights on how the technology reshaped the hospitality industry.

This article aims to define how the luxury hotel brands are using the technology to improve their services, but we realize an existing lack of research on how the luxury hospitality implemented the technology all along the different customer journey stages.

There are few researchers who attempted to analyze how these technologies affect the customer journey interaction.

Prior to the interaction, we must take into consideration that the luxury tourists' decisions are taken based on concrete factors which reshapes their decision-making process.

Since the origins of the hospitality industry, the business of luxury hospitality has been based on personal interactions, moving now into a digital communication scenario, providing much more non-human-controlled factors, creating a base of reference on how technology is taking over the change of paradigm of luxury hotel brands and customer interactions.

In the next figure, we can check the different kind of factors which historically have influenced the traveler's decisions, and how these factors welcome some more current hidden factors we do not perceive but are created through the technological communication.

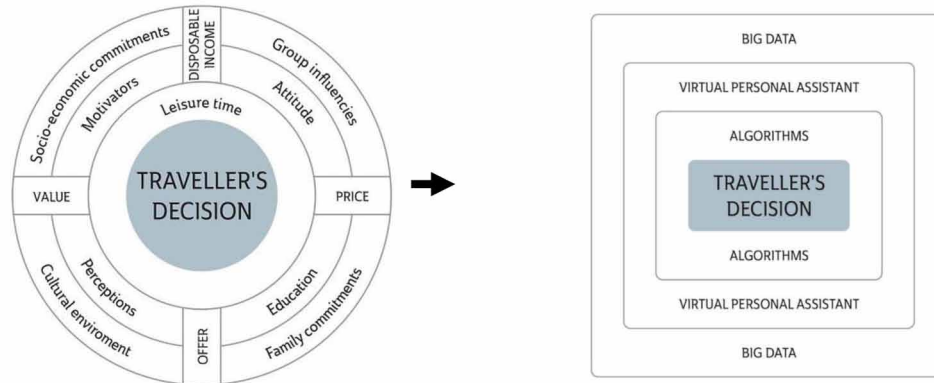
Based on the previous figure, the customer journey service is apparently being reshaped and built by technological factors which have been incorporated in the decision-making process. Hence, the luxury hospitality companies must consider how to target their clients to provide bi-directional customer-hotel conversations which are becoming personalized and based on a better user experience. Zsarnoczky, M. (2018).

When both clients and luxury hotel brands realized this new scenario of digital conversations, and how these factors are modifying the decision-making process, hence, the customer journey communications, it is necessary to question how important would be the fact of being ever connected also during the hotel stay, wondering if the hotel experience stage would require these connections, (prior to this sanitary emergency we are facing), Loureiro, A. (2017).

Some researchers consider that it is true the importance of technology and high-tech, state-of-the-art tools in facilitating the co-creation and delivery of experiences in the context of luxury hospitality. However, it also emphasises that the high-touch dimension is the core of hospitality in luxury and premium hotels and should remain the primary driver of this segment.

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Figure 1. From past factors of traveler's decision, to current factors of traveller's decisions. Source: Zsarnoczky, M. (2018)



Luxury hotels will have to fine-tune and tailor their services and provide the right mix of high-tech and high touch, depending on the micro-niche segments to which they cater. Bharwani, S., & Mathews, D. (2021).

Based on this new communication dimension, the luxury hospitality companies are looking for approaching to the luxury guests to motivate them to become hospitality services consumers through a digital conversation based on engagement and branded content strategies.

These strategies target the luxury hospitality clients, and based on the results of the interactions, guests are welcoming and considering as a positive strategy from the luxury hospitality brands, to develop a digital brand conversation and a digital service which makes a significant effect on the perception of the luxurious and quality-based service during the digital customer service. Quarm, R. S., Adoli, H. L., & Zadid, A. I. (2020).

Prior to the improvement of these digital engagement-based conversations, it is already proved that technologies applied during the booking stage of the customer journey, strengthen the overall bookings experience satisfaction with hospitality brands. Huang, C. D., Goo, J., Nam, K., & Yoo, C. W. (2017).

We also have to consider that online guest service quality contributes to customer satisfaction, then influences their brand loyalty. Additionally, customer satisfaction when using technology, acts as a partial mediation on the relationships between the luxury hotel website service quality and their guests. VO, N. T., Chovancová, M., & Tri, H. T. (2020).

Having discussed that some new technological factors of travel decision made that hospitality companies initiates online engaging conversations with potential brand clients, looking for generating more bookings, it is demonstrated that hospitality companies are using the technology to increase their revenues in order to protect their market share against intermediaries or disruptive business models.

Therefore, it makes sense to maintain the customer service through technological channels, as a necessary strategy to guarantee the client engagement. Alrawadieh, Z., Alrawadieh, Z., & Cetin, G. (2020).

However not only the luxury hotel chains are willing to adopt the technology becoming early adopters on digital conversations with their clients, since it is a global trend of the industry to overcome the barriers triggered by the worldwide sanitary emergency, which moved these customer service journey into the digital world.

As an important part of luxury hotels to keep relevant within their clients and guests, technology can be also used in a different way. Electronic word-of-mouth on social networking sites is one of the most effective marketing resources in the lodging industry. The interaction between the tourists in the hotel through the technology must be ethical and respectful at each moment, Saura, J.R., Palacios-Marqués, D. & Iturricha-Fernández, A. (2021), as it should be in the luxury hospitality before and after the pandemic, Ribeiro-Navarrete, S., Saura, J. R., & Palacios-Marqués, D. (2021).

Furthermore, the usage of eWOM on social networking sites not only helps potential guests select suitable luxury hotels but also allows luxury hoteliers to better cater to this growing market segment. Lee, H., Min, J., & Yuan, J. (2021).

The lockdown accelerated the adoption of technology all over the industry, and luxury hospitality companies had to quickly adapt their technological systems to stay relevant all along the customer journey, in order to maintain their brands on top of mind of the clients.

These changes to adopt the digital technology to improve the customer service, enriches the conversations between the hotel and the client, and provide added value for the customers. This adoption made companies embraced new technologies as many other tourism companies due to the pandemic crisis, in order to be ready for the moment when travelers and clients they can go back to experience the luxury hotel services onsite. Ivan, I. (2020).

As a part of these digital conversations, it is important to consider the efficiency of the application of the technology on the booking systems. It has no sense to provide a great customer experience during the inspiration of engagement stage of the digital conversation with the hospitality brand, and not provide it during the booking process, once the clients chose a concrete luxury hospitality company to experience their Holidays, Busulwa, R., Evans, N., Oh, A., & Kang, M. (2020).

Once in the hotel, when the guests are experiencing the customer service, the use of technologies to enhance the self-service and contactless interactions is becoming necessary. But we have to consider that we are talking about luxury hospitality and the traditional personal physical customer services is not going to be replaced due to the excellence provided by these luxury hospitality brands.

In fact, most of luxury hospitality clients, perceive more benefits on the personal interactions rather than on self-service digital technologies interaction.

Nevertheless, we can sustain that luxury clients of luxury hospitality brands are moving to gradually accept that the quality-based service can be ruled and managed by technology, with a greater preference for smartphone-based technologies . Liu, C., & Hung, K. (2020).

Furthermore, during the onsite hotel experience stage within the luxury hospitality customer journey, we find different technological implications to make easier the stay of the hotel guests. Now technology is being used to make easier the interaction with the room facilities, and the use of smartphones is once again making easier the features of the technology application into the guest room. Torres, A. M. (2018).

These rising perceived effects of the digitalization on the luxury hospitality companies, can be alleged from several perspectives, but we must highlight the positive and innovative strategies that could be implemented to fill the customers' expectations through the digital application in the luxury hospitality industry. Gamage, T. (2021).

Some scholars argue that hospitality industry has not to focus only on the technology itself but on how it can be used for the benefit of the luxury hospitality clients only during the mentioned onsite stage of the hospitality experience.

Therefore, there are researchers suggesting that the era of engage and build branded conversations with potential clients through digital channels is over, and it is time for facing upcoming technologies as the use of blockchain for hospitality industry rather than the current situation. Önder, I., & Gunter, U. (2020).

As a conclusion of the literature review, we could reveal that scholars showcase how different technology applications are becoming useful without any doubt. Regarding the hospitality luxury companies, their popularity and the early adoption of customer journey service technologies is flourishing and undoubtedly changing the digital client's behavior. We can undertake that combination of different technologies can maintain the customer journey interaction and the perception of service quality to be spread to inspire clients to choose a concrete luxury hospitality brand.

Finally, we must say that both technologies for planning and booking your stay, as well as technologies to make their own side experience seamless and rewarding, allow digital guests to share the experience through the use of these mentioned technologies. Dorcic, J., Komsic, J., & Markovic, S. (2019).

## **METHODOLOGY**

### **The Case Studies**

The case study is one of the many different ways of researching best practices in the travel and tourism industry. In this context, the case study that we are analyzing, will allow us to focus on the current phenomena of the digital customer journey interactions in the luxury hospitality.

Through the analysis of the case study, we will be able to establish certain evidence through targeting the procedures followed by the luxury hospitality companies in achieving their objectives. In this chapter, we have adopted the explanatory case studies methodology, aim to answer the luxury hospitality and technology relation and phenomena, within the contexts of real-life situations.

Advantages of selecting exploratory case study procedure include analysis within the context this topic (tech and luxury hotel), integration of qualitative perceptions, and the ability to capture events of real-life situations so that the fact can be explored in larger levels of complexity. The exploratory case studies do have specific weaknesses that may involve lack of rigor, challenges linked with analysis and truly little basis for generalizations of findings and conclusions.

The exploratory case study must contemplate taking into consideration the different perspectives brought to this analysis, and the different findings which will be concluded by the company.

Exploratory case study methodology allows investigators to conduct an in-depth analysis within some specific context as the luxury hotel case study and the technology interaction.

First, in this article we did research real case studies and experiences, learning from recently performed in-depth luxury hotel case studies in the luxury hospitality industry. Rather than examining these hotel case study in general, the chapter explores each particular situation through various hotel chains, and it undertakes the study through variety of situations in order to reveal multiple facets of the application of the technologies in the luxury hospitality.

In these exploratory case studies, a real-time event is explored within its naturally following framework, with the understanding that each situation and perspective will create a difference.

Even though being one of the most frequently used research methods in academic research, the researchers have not yet developed consensus on preparing and completion of case studies due to the singularity of the luxury hospitality industry and the common subjectivity around this industry, even



considering how technology is evolving just daily. We are going to analyze 5 case studies on how the technology reshaped the interactions and the quality of services.

## **RESULTS ANALYSIS**

Luxury hospitality companies are confronting the challenge of being prepared and up to date on providing technological channels to spread their quality standards through digital interactions. When talking about customer engagement, Mandarin Oriental is working on personalizing the customer engagement, through a new and relaunched website.

Guest centric strategy is a must for this hotel chain, and they have designed a new website to maintain the conversation with their clients during the prohibition of travelling all around the world. The website development is also accompanied with the development of a whole portfolio of digital tools to interact with the clients, promising that the enabled digital conversations will change the onsite experience of the client, once at the hotel, not only when interact with the hotel staff but also on the quality of service perceived.

These digital tools such as online check-in, or in advance room selection, will enable staff to prepare everything with a devoted service but with a contactless interaction, and it means that Mandarin Oriental is focused on relationship-building from the early stages of the customer journey, as the inspiration stage, looking for building trust from the client side, delivering a better service once the onsite interaction happens.

Mandarin Oriental is also wondering how the better use of data will deliver a major growth opportunity for this hotel chain, which have gathered huge amounts of relevant data but have not yet converted this into an enhanced customer experience. *Luxury 5 Star Hotels & Resorts Worldwide | Mandarin Oriental Hotel Group*. (2020, 4 september).

In this regard, world-famous Peninsula Hotels luxury hospitality brand, have been working on drafting a digital strategy which matches the client's expectations. Peninsula clients expect a digital experience aligned with the high-quality level of the brand.

Peninsula brand strategists realized that today, luxury hospitality brands must move from being a hospitality brand focused on delivering a world class service, to become a digital luxury hospitality brand delivering an online world-class service.

The company wants to provide a kind of luxurious digital experience from the very first interaction of the client with the company technologies. Therefore, Peninsula Hotels established a 30 people team to provide digital personalized attention, using social media accounts from a business perspective side, rather than a branding portfolio.

Now, Peninsula Hotels increased the guest digital conversations prior to the onsite hotel experience, due to the capacity of the technology adopted and the human resources implemented on this task, being able to sell and upsell more luxury services in advance.

Due to the decision of enhancing their digital conversation skills, the brand moved to a better current position in services in social media, climbing almost 30 positions in the international ranking of luxury hospitality brands in social media.

This achievement has been perceived by clients, who perceived that the digital conversations were more realistic and personalized, and it was made just creating the in-house team of digital customer experience, reducing development and implementation times as well as costs, inspiring the digital journeys

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of the potential Peninsula Hotels clients, pushing up the conversions from inspiring digital interactions to Peninsula hotel bookings. *The Peninsula Luxury Hotels Group*. (2020).

But sometimes, to be able to digitally engage with the clients due to the technological innovations implemented by the hotel chain is not enough. Some luxury hospitality chains are willing to provide this service during the customer journey, focusing on concrete segments, based for example on age segmentation.

This is the case of how Raffles Hotel, which is a world landmark on luxury hospitality traditionally seen as a hotel chain for senior generations of clients, placed the target on younger generations due to the technology implementations. Raffles was looking to attract a wider younger segment of clients, but they need to reshape the message of the brand and move it from traditional communication channels into digital channels.

They drafted a complete digital strategy based on the motivations of the young affluent segment of clients, establishing different connecting dots with them. For example, Raffles wanted to get the most of their event's venues and decided to create a strategy to connect with young couples who wanted to get married soon in style and with distinguished and guaranteed exclusivity. Therefore, Raffles created an international digital campaign combined with a digital event, producing an annual wedding branded-content workshop.

The expected results were expanded, and the hotel chain gained more than 17000 new contacts of potential clients younger than 30 years old. In very few weeks, adapting the message for this group of interest, the overall digital strategy enlarged the company average engagement within the segment, booking more than two times the expected weddings in two months' time; an achievement never matched before. *Raffles Magazine - Luxury Hotels & Resorts - Raffles Hotels*. (2020, July).

Sometimes, the interaction is already achieved, not as the previous case, and it is all about to refresh the inspiration messages. AMAN Hotels is a luxury hospitality brand world perceived as the designers of the hideaway luxury hospitality and is currently benchmarked by many other luxury hospitality brands.

But this brand in less than five years house redesigned the overall way of interacting with their clients through their websites. AMAN wanted to generate the best of luxury hospitality websites design to drive new messages on customer relationships of connection with the client, from the very first inspiration moment until the check-out moment in the digital 'scenario.

A new digital technical platform was created incorporating a highly tailor-made online booking system. These improvements were followed by new interactive tools as chatbots, and a new up-to-date content to be used during the digital engagement with clients in the social media conversations. As a result, AMAN created a new portfolio of revamped websites where building growing organic traffic and increasing direct booking through rather than through OTA websites.

To support the interaction with any user, this brand also designed their websites in a responsive way in order to allow any digital consumer to interact with AMAN no matter the technology that the client is using. In this regard, this brand matched the expectations of the clients who wanted to have direct conversations learning new inspiring messages, achieving the brand objective, since brand loyal clients and members of the brand membership program used these new developments. AMAN closed the digital circle creating a new smartphone app, which allows much more immediate contact and service delivery with the clients.

The app allows conversations to become much more direct and richer for both the guests and the hotel brand. The purpose of the app is to be perceived as a digital concierge in the pocket of the client,

enhancing the on-site experience, providing exclusive information, or featuring tools for enriching their stay, as the digital key or the facility of book hotel services in advance from the smartphone.

The digital ecosystem of tools and technologies created by AMAN, established more authenticity to stand out and connect through digital stories; The data gained during these digital interactions, confirmed that luxury clients are currently looking for inspiring messages when planning luxury stays, even though pandemic did not hurt these inspiring expectations, but increasing them. In general AMAN affluent guests welcome the inspiration since it reflects the uniqueness of the luxury brand.

From the perspective of the client, to be able to connect with the AMAN at any moment of the customer journey is perceived a real luxurious and high-level service and proves how this luxury hospitality brand takes seriously the customer service journey in the digital universe. *Aman Hotels & Resorts - World Hotel Destinations Across to Globe* –. (2020, 15 april).

Moving into big players: How the biggest hotel chain anticipated this trend and unveiled the digital interactions on customer service with their clients? Marriott Hotels & Resorts is a good example on how a luxury hotel brand engages with their customers through stories transmitted through digital channels.

This brand decided to focus on branded content creating a series of international city guides linked with their most luxurious properties and brands. This content was able to catch the attraction from the wealthiest clients, inspiring them to book room nights in their hotels, as an entry door to the different expedencies displayed on these guides. Marriott also paid attention to another stage of the customer journey which is the sharing stage:

The brand pushes clients to be protagonists of their own user generated content, sharing their experiences in social media showcasing these experiences through their channels in order to inspire more brand clients. Marriot digital strategies make easier to place the brand into the guest digital perception, which is necessary to engage and connect with digital tourists. More and more platforms are coming up and more and more tools are appearing to connect with travelers and share different experiences inspiring future hospitality luxury guests.

Hence, Marriot launched long time ago their social media accounts, their own hotel property chatbots, or a wide range of dedicated websites, covering the whole digital interactions with their clients, so their efforts are dedicated to increase the interaction, since the tools and channels are mostly updated and useful.

Some new interactive tools that Marriot is beginning to use are for example that luxury hospitality clients can also book the Marriot services though a personalized online booking process, which does not need the intermediation services, becoming now direct so that clients can directly check savings and benefits directly from the brand.

Another relevant disruptive technology adopted by Marriot is based on segmentation. Not only the age segmentation Raffles implemented, but also segmentation by regional markets. In this regard Marriot innovated launching a program, combining direct chat with online payment using the functionalities of the Chinese leading company, WeChat, combining payment and chat facilities.

This service implementation allowed the brand to cover the whole customer journey, being present on the digital conversation from early stages until the last interaction after the hotel experience.

This technology made accessible for Chinese travelers to directly discuss with the property and with the guest experience professionals from their smartphones, being able to digitally pay once at the hotel or in advance. *Hotels & Resorts | Marriot Bonvoy*. (2020, 7 september).

All the previously benchmarked technologies mean that the digital customer journey of the clients of the luxury hospitality brands are becoming much more seamless from the very first moment the digital connection begins.

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Most of luxury hospitality brands are willing to create one-stop solution for all the different stages of the customer journey. In fact, the digital technologies allow hotel brands to also make much more further connections based on real interactions from the digital side.

Most of these brands are also using the digital platforms to inspire their loyal clients allowing them to buy the different goods of the brand anyone cannot buy directly in the property, as bathrooms sets, bed linen sets, or hotel artwork, etc, which is only possible thanks to the digital customer journey.

## **CONCLUSION**

Digital technologies are useful to provide content an interaction with the brand as well as looking for digital feasibility, and more and more the experience is becoming easier for all kinds of digital users.

The digital strategies are currently facing how to increase direct bookings in the luxury hospitality websites. It is interesting to see how digitalization is helping to the luxury hotel brands to overcome the situation of hospitality industry lockdown. Baum, T., & Hai, N. T. T. (2020).

The current situation strongly suggests that technology integration within the hospitality brands and the client's adoption must be focused on making easier the future hospitality operations.

During the last year we have pumped the digital hospitality technologies to provide a better and closer service through a customer journey more dedicated to reminding good moments of the clients in the past.

Some recent investigations revealed that luxury hospitality chains are facing a great technology adoption to maintain the customer journey quality with the clients after the pandemic and during the next couple of years. Gursoy, D., & Chi, C. G. (2020).

We have seen how different hotel chains put into practice different strategies on how to tackle day distance and separations of the clients due to the current restrictions we are suffering, but all of them genuinely believe that the digital discussions and the enhancing of the customer service through digital technologies undoubtedly drives into more revenues for these hospitality brands.

We cannot forget the hotels must track and measure the impact in the global interactions they have in order to control the conversations at each moment Saura, J.R. (2020). We also have to consider we are talking about luxury travelers and luxury clients who are usually affluent people, and they are very keen on their own privacy and data. Hence these luxury hotels they must see create a privacy policy guaranteeing the confidentiality of the conversations between the luxury hotel and the clients at each stage, Saura, J. R., Ribeiro-Soriano, D., & Palacios-Marqués, D. (2021).

## **Practical Implications**

Some practical simplifications are directly aligned with the analysis of this article. For example, that thanks to the technology, the hotels are increasing their bookings certainly. It is a practical implication that as much developed is the digital interaction with the client, more possibilities the hotel chain has to gain more revenue.

The enhancement of the hospitality technologies boosts the digital customer journey from the very first moment that any potential guest is looking for a luxury hospitality brand, making it easier for these clients to find the adequate brand and to connect with their choice.

The use of technology can track the practical implication of the new increasing cost of guarantying the social distance during the onsite hotel experience; there are several concerns on how to create the

necessary adjustments to guarantee distances without reducing the customer journey quality since the hospitality industry has been based on human relationships and social interaction.

It would be interesting to analyze the implications of the distance and displacement effect due to the sanitary restrictions and how this technology will help in the short term.

It is interesting to mention the different practical implications that the technology can provide to the luxury hotel industry. First at all, we have to consider the technology made hotel clients to meet remotely during this pandemic we have suffered, allowing them to create conversations through social media or through different technological communication channels.

This implication means that the flow of information between both players is solid and continuous, achieving a tangible practical implication improving the customer relations and experience.

Another practical implication is the possibility of improving the experience during the hotel stay due to the technology. Once at the hotels, and taking into consideration the high-level of the hotels, the guests can have immediate access to the hotel services and facilities through the app of the hotel, or through the webapp designed to get direct connection with the luxury hotel staff.

## **Theoretical Implications**

Clearly mentioned in the introduction of the research, there is a lack of research on how the technology positively or negatively affects the luxury hospitality brands during the interactions with the clients along the customer journey.

A lot of research can be done if researchers will assess the growing interest on focusing on this topic, moving from the overall hospitality research to the luxury hospitality research on how technology can reshape and improve the digital guest experience.

This chapter include novelty topics on how the interactions between the hotel guests and the luxury hotels adding new implications on how the technology can recover the guest relations after this pandemic stage.

One of the most interesting novelty, is to consider on researching on how the new relationship between the luxury hotel guest and the luxury hotel is . After this lockdown in pandemic. There is an unexplored scenario on the relationship between clients in luxury hotels, it is important to mention that the technology can facilitate the new interactions.

## **Limitations and Future Research**

There are obvious research limitations and future research opportunities. The future of the revenue figures and the digital client connections with the luxury hospitality brands is not scientifically proven, showing an interesting limitation to research about, since it will depend on how effective the interaction between these brands and the luxury hospitality clients will be.

The fast increase of many technology solutions which is happening from the last decade in the hospitality industry, is changing how consumers will decide on the relationship model with the luxury hospitality brands.

Hence, there is a lot of opportunities for future research, based in concepts as the information requests during the customer journey and how to target that flow of information from the brands to the clients.

Another future research should be focused on understanding how positively or negatively affect the overall presence of the brand during the whole customer journey of the client.

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An additional future research should stress the current necessity on providing data for future feasibility of the technological interaction between the brands and the customers overdone the current bookings or conversations.

Another topic to research about could be focused on the utility of tracking the use of technology from the information site to the data site when talking about luxury hospitality brands, in order to continue enhancing the clients experience during the whole customer journey but based on existing data analysis in this case.

An alternative potential future research should be focused on how these websites will showcase and will provide tailor made branded information and where are the limits to make the brand image more personalized within the client profile.

Therefore, more research can be produced to check how the customer journey conversations based on digital promotions could become relevant to push potential clients to interact with the hospitality brand, and how it will affect in terms of revenue for the hotel brand.

A behavioral research is also welcome due to the current situation on how the luxury hospitality brands are maintaining the client's feeling of trust, after this pandemic situation, and how the digital platforms and digital strategies of interaction between the luxury hospitality brands and the luxury hospitality clients could enable the building of trust, along the different digital touchpoints.

Regarding trust, it also will be interesting to analyze how the digital technologies of the luxury hospitality brands will help to the clients to feel safe on testing health and sanitary safety in any concrete hotel, tracking and tracing security checkpoints prior to the experience in the hotel though digital tools, being updated on potential changes or urgent communications between hotel and client.

Regarding safety measures, yet it has not been researched on how the customer journey into digital platforms can help to spread the voice of the contactless technologies provided by luxury hotel brands, in particular the contactless way to interact with the existing onsite luxurious service but controlling new contactless aspects of the customer journey.

This potential research should welcome factors as the automation during the process, or the usability of the virtual and augmented reality as well as updated health safety requirements on demand. Since COVID-19 transformed our travel motivations, finally, another future research could be conveyed to highlight and discuss how to pandemic transformed the motivations of the clients of the luxury hospitality brands.

This transformation can be analyzed not only from the perspective of the length of the stay, but also about the motivation of the stay, being interesting to research on how the new messages based on health and safety provided through digital channels are attracting new motivations of the clients to travel to these hotels, as the remote work, or looking for an added value on protection, providing feasible guarantee of safety when luxury guests travel to luxury hotels.

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## KEY TERMS AND DEFINITIONS

**Affluent Guest:** Guests with annual incomes that should be considered a very rich person.

**Chatbot:** A computer program designed to simulate conversation with human users, especially over the internet. Hospitality is the computer program designed to stablish interactions between the luxury hotel and the hotel guests.

**Customer Journey:** Eat describes the path of a guest of any hotel from the very first moment that they get information about the hotel until they leave the hotel after their experience.

**Digitalization:** At the early technological services times, the conversion of text, pictures, or sound into a digital form that can be processed by a computer. Currently adding conversion of physical services for example.


**Guest Service:** Is the mix of tangible and non-tangible services offered from a hotel to a guest, from the social interactions to the physical interactions including the products consumed and experienced by the guests in the hotel.

**Luxury Hotel:** This is a hotel with high level service in terms of the quality of the products and the services offered.


# Chapter 15

## Approach to Social Media Marketing Strategies in Different World Regions: A Descriptive Study

**Luis Matosas-López**

 <https://orcid.org/0000-0001-7313-0146>  
*Rey Juan Carlos University, Spain*

**Roberto Baelo Alvarez**

 <https://orcid.org/0000-0003-1003-6739>  
*University of León, Spain*

### ABSTRACT

*The present study, using a sample of university organizations from different world regions, aims to provide an overview of social media marketing strategies used in different geographical locations. For this purpose, the authors conducted a descriptive study of the communication patterns implemented by university institutions in four regions: Africa and the Middle East, North America, Latin America, and Europe. The study, which adopts a comparative format, contrasts the findings obtained in each of the aforementioned regions, highlighting the existence of both similarities and differences in the social media marketing strategies of the organizations observed. In line with previous research, the authors took Twitter as the social media platform to be monitored.*

### INTRODUCTION

The development of Information and Communication Technologies (ICTs), in general, and the emergence of the Internet, in particular, has caused numerous social changes in the past decades (Cabero Almenara et al., 2007; Feng et al., 2019; García-Jiménez et al., 2013; García-Ruiz et al., 2015; García Galera et al., 2017; Gómez-García et al., 2020; Richter et al., 2011).

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Access to the Internet among the citizenry has resulted in an increase in the use of social network services. By 2020, the number of Internet users worldwide reached 4.54 billion, being the average penetration of social media users 49% (Kemp, 2020). This average penetration in global terms obviously varies between countries. Thus, for example, the percentage in Ghana is 20%, in Egypt 41%, in Germany 45%, in Colombia 69%, in the US 70% and in South Korea 87% (Kemp, 2020).

The impact of these platforms over time is undeniable, and their integration into our daily life is a consummate reality (Piscitelli, 2010). The success of social media is caused by different factors, but among them stand out aspects such as the dynamism of the content, its collaborative utility, its intuitive use, its easy access and its interactive nature (Castaño et al., 2015).

Nevertheless, what is a social network service? Castañeda Quintero (2010) generically defines these platforms as those telematics tools organized around user profiles, personal or professional, that pursue the objective of connecting people with common interests.

The literature review by Almansa, Fonseca and Castillo (2013) differentiates three major topics of research in this field: (a) user representation and generation of links between users (Junco, 2012; McAndrew and Jeong, 2012); (b) structuring of the network around interests and motivations (Backstrom et al., 2006; Liu et al., 2006); and (c) privacy and risks of the media (Calvete et al., 2010; McBride, 2011).

The information stored on these platforms provides a vast record of thoughts and behaviors of individuals of all types and social conditions. In recent years, users' messages in social network services have been used around the world to explore social, economic, and cultural realities of various kinds. Examples of this are the analysis of the ideological polarization of political parties (Urman, 2020), the prediction of economic fluctuations in stock exchange markets (Li et al., 2016), the dissemination of hate messages after terrorist attacks (Bruns and Hanusch, 2017), the identification of environmental problems in certain areas (Chen et al., 2015) and the momentum of social activism movements (Matsilele and Ruhanya, 2020).

The widespread nature of the social media phenomena has transformed the way we communicate and interact with our environment to the point of making it necessary to create a descriptive term for the typical user of these platforms.

The academic community has recovered the term "prosumer", a term created during the 1970s (McLuhan & Nevitt, 1972; Toffler, 1980) to define the typical user of this media. Born from the union of the ideas of producer and consumer, "prosumer" serves to describe those individuals capable of consuming what they themselves produce. More recently, other authors have created from this concept the term "media prosumer" to refer to the user accustomed to the social media setting.

Sandoval Romero and Aguaded Gómez (2012), for example, describe the "media prosumer" as the subject able to take a leading role in the media, producing and consuming information to generate a culture of participation and interactivity. Sánchez Carrero and Contreras Pulido (2012), for instance, define the "media prosumer" as the user who actively assumes the role of the communication channel, becoming a recommender and opinion generator on a variety of topics.

However, the particularities and motivations of this "media prosumer" require an in-depth analysis. For this purpose, one of the approaches commonly employed by researchers is the so-called Uses and Gratifications Theory (U&G). Even though this approach has been applied in numerous studies on the use of social media in recent years (Chen, 2011; García-Ruiz et al., 2018; Matosas López, 2018; Raacke & Bonds-Raacke, 2008; Smock et al., 2011), U&G theory had been used previously to describe how audiences interact with other mass media such as radio, press or television (Katz et al., 1973, 1974; Ruggiero, 2000).

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The conceptual framework defined by this theory explores how mass media is used to meet the needs of the individual. In accordance with Rubin (1994), U&G theory is based on five pillars: (1) the selection and use of the media have a goal; (2) the subject is the one who takes the initiative by selecting the media in order to satisfy an existing need; (3) the subject's behavior is conditioned by different social factors; (4) there are different media alternatives that compete with each other in terms of selection, use and needs satisfaction; and (5) the subject has a position of empowerment in the media.

The nature of the social media phenomena fits perfectly with the assumptions established by this theory. Users, having other possibilities, freely choose these platforms; they access them to obtain a reward; their communication is conditioned by social aspects; and they enjoy a position of privilege on the platform. The potential of social network services to propagate information to large audiences, as happens with other mass media (press, radio, or television), makes the U&G theory particularly suitable for contextualizing research in this field.

### **Chapter Objective and Structure**

This chapter, using as a theoretical framework that of the U&G theory described above, aims to explore, from an international perspective, the social media digital marketing strategies carried out in different geographical locations around the world.

For this purpose, the authors conduct a descriptive study of communication patterns implemented in university organizations of four regions: Africa and the Middle East, North America, Latin America, and Europe.

The study adopts a comparative format, addressing the similarities and differences in the social media marketing strategies of the organizations subject to observation.

The chapter structure is organized as follow. Firstly, the chapter presents a Theoretical Background section in which the authors address, on the one hand, the importance of social media at university organizations and, on the other, the relevance of these techniques as marketing and communication tool in these institutions. Secondly, the Methodology is presented detailing all the information required within the subsections of: Sample Design, Data Extraction and Cleaning, and Data Analysis. Next, the authors show the main findings obtained in the Results section. To conclude, in the chapter's final part, the traditional sections of Discussion and Conclusions are presented, the last one including specifically subsections of Professional and Managerial Implications and Limitations and Future Research.

## **THEORETICAL BACKGROUND**

### **Social Media at University Organizations**

Within the university context, U&G theory is also used in numerous studies. In this regard, most authors who adopt U&G theory in their research examine the use patterns of these technologies among university students. Examples of this are the studies by Durán and Guerra (2015), García-Ruiz, Tirado and Hernando (2018), Florenthal (2015), and Doval-Avenidaño et al. (2018).

Durán and Guerra (2015) explore the addictive behavior of students from different degree programs in the use of the extinct social network Tuenti. García-Ruiz, Tirado and Hernando (2018) examine the benefits that students find in the intensive use of Facebook, Instagram and YouTube. Likewise,

Florenthal (2015) discusses the motivations and barriers that business students identify for the use of LinkedIn. Finally, Doval-Avenida et al. (2018) explore the reflections of a group of communication students after remaining deprived of access to their digital devices, and therefore their social profiles, over a 24 hour-period.

Another topic of study in the university context is the application of these technologies as a support for teaching. Notable in this regard are studies by Kabilan et al. (2010), Cabero and Marín (2014), Santoveña-Casal and Bernal-Bravo (2019), and Matosas-López and Romero-Luis (2019).

Kabilan et al. (2010) examine the possibilities of using Facebook as a learning environment in English language teaching. Similarly, the study developed by Cabero and Marín (2014) explores the instruction potential of different social networks (Twitter, Facebook, LinkedIn or Hi5) for collaborative purposes. The study conducted by Santoveña-Casal and Bernal-Bravo (2019) examines the use of Twitter as a motivational element in autonomous learning processes. Finally, the study by Matosas-López and Romero-Luis (2019), with Marketing students, explores the correlations between usage patterns on Facebook, Twitter and Instagram, and how students perceive the usefulness of certain digital learning resources.

## **Social Media in University Organizations as a Marketing and Communication Tool**

University organizations, like any other type of organization, set their goals in the context in which they operate, to meet the needs of their target audiences. Although the target audience of any university, within its social purpose, consists of a wide range of entities (government agencies, companies, social agents, etc.), students in their broadest sense occupy a leading position. This category includes current students, future students, and alumni.

With regard to the student community, then, universities design and implement recruitment and loyalty plans in the same way that any company would do. Recruitment plans aim to reach as many subjects as possible, and loyalty plans build links with current students and with those who will become alumni after their graduation.

Within this context, examples of actions that could be part of recruitment plans are open days, participation in educational fairs or advertising in the press, radio, or television at the local level. As far as loyalty plans are concerned, we can point to discounts on subsidiary educational services, tuition funding, or the creation of postgraduate programs linked to student's undergraduate training.

These recruitment and loyalty plans are a good example of the type of actions that are framed in the marketing strategies of any university organization, whether public or private. However, all the foregoing actions are contextualized in an offline setting. In addition to this offline setting, there is also a wide range of potential actions within the digital sphere. Banners on educational portals, as a recruitment mechanism; or newsletters, as a loyalty tool, are just two examples. In this area of marketing strategies in digital environments, social network services are particularly relevant.

In recent years, these platforms have been used intensively by university organizations around the world. Nevertheless, different authors claim that there is still wide margin for improvement in exploiting these technologies as part of university marketing strategies. Casanoves Boix et al. (2018) point out that universities should invest in a greater and more professionalized presence on social media, in order to enhance their branding strategies. In the same line, Guzmán Duque et al. (2012) underline that these technologies should help universities to consolidate their corporate identity and to develop promotional and recruitment campaigns in the territories in which they operate.

## ***Approach to Social Media Marketing Strategies in Different World Regions***

Although social media marketing strategies still have a wide margin for improvement, numerous works have addressed this issue in recent years. Table 1 shows some of the studies conducted over the past ten years.

Laaser et al. (2012) use semi-structured interviews with management experts to analyze the use given to social network services such as Facebook, Twitter, LinkedIn and Google+. Concerning the use of these platforms, the authors reveal the existence of management problems, lack of strategic vision, and the need to define efficiency and reach indicators.

Kuzma and Wright (2013) study the role of Facebook, Twitter, LinkedIn and MySpace as a catalyst in the transformation of marketing strategies in the university context. According to these researchers, when such technologies are properly integrated into the organization's strategy, they not only create added value for the institution's audience and stakeholders, but also act as a recruitment instrument.

The study by Valerio Ureña et al. (2014), focusing on Facebook, examines the engagement between institution and target audience on this platform. The authors identify that time of publication impacts effectiveness in terms of likes, comments, and shared content; showing that the most successful publications occur outside the workday and usual office hours.

Bulbulia and Wassermann's research (2015) discusses the possibilities of using Twitter as a channel of interaction with the student community. In this work, the authors emphasize the possibilities of using social network services in the university context, and that the communication potential inherent to these technologies is not always exploited.

Túñez López et al. (2015) analyze the usefulness of Facebook and Twitter as digital communication tools in a sample of universities. In addition to showing that most publications were concentrated in the early and central part of the week, the authors point out that the content is fundamentally composed of images and links.

Similarly, Laudano et al. (2016) examine university libraries' use of the social network Twitter. Their findings reveal that although libraries use this platform to disseminate information about collections, services, or to promote activities, their use is generally diffuse and poorly planned from the strategic point of view.

The study conducted by López-Pérez and Olvera-Lobo (2016) explores the use of social networks for the dissemination of research results at the public university. The authors note that around 40% of the institutions examined use their corporate Facebook and Twitter accounts in the propagation of this type of content.

Puertas Hidalgo and Carpio Jiménez (2016) examine universities' use of Facebook, Twitter and Instagram platforms from a strategic perspective. The authors point out that the engagement generated throughout these social network services help the organization in achieving its strategic objectives.

Cabrera and Camarero's work (2016) analyses the communication channels used by universities for the dissemination of science and technology events. Among other findings, shows that 80% of students use Facebook, even above the university website, to be informed of their faculty events.

Peruta and Shields (2017) study how Facebook can improve engagement between university organizations and stakeholders. The authors demonstrate that aspects such as type of publication or publication frequency can contribute to improving both engagement with the audience and dissemination of the organization's content.

## Approach to Social Media Marketing Strategies in Different World Regions

*Table 1. Studies on the use of social media as a marketing and communication tool in the university context*

Author/s	Platform considered	Region where the study was conducted
Laaser et al. (2012)	Facebook, Twitter, LinkedIn, and Google+	Latin America
Kuzma and Wright (2013)	Facebook, Twitter, LinkedIn and MySpace	Asia, Africa, and Europe
Valerio Ureña et al. (2014)	Facebook	Latin America
Bulbulia and Aquarius (2015)	Twitter	Africa
Tuñez López et al. (2015)	Facebook and Twitter	Europe and Latin America
Laudano et al. (2016)	Twitter	Latin America
López-Pérez and Olvera-Lobo (2016)	Facebook and Twitter	Europe
Puertas Hidalgo and Carpio Jiménez (2016)	Facebook, Twitter, Instagram, and Google+	Latin America
Cabrera and Waiter (2016)	Facebook	Latin America
Peruta and Shields (2017)	Facebook	North America
Bodunde et al. (2017)	Facebook and Twitter	Africa
Kimmons et al. (2017)	Twitter	North America
Quintana Pujalte et al. (2018)	Twitter	Europe
Wu et al. (2019)	Facebook	Asia
Matosas-Lopez and Romero-Ania (2020)	Twitter	Europe

Source: Self-elaboration

Likewise, Bodunde et al. (2017) compare the internal and external communication strategies of university organizations and banking companies. After exploring the uses given to Facebook and Twitter, among other marketing instruments, the authors emphasize that transparency and dialogue are key in the success of any organization, regardless of its nature.

Kimmons et al. (2017), analyzing a sample of 5.7 million Twitter messages from higher education institutions, underline that although social media has improved the reach of these organizations, their current reach is limited. The authors reveal that most of the messages from these institutions are one-way, lacked any feeling and focused on a very small variety of topics.

The work of Quintana Pujalte et al. (2018) explores the use of social media accounts to respond to situations of institutional crisis. The study reveals how the Twitter social profile can be used in such circumstances to redirect the flow of corporate communication, either to the official university website, or to press releases.

Wu et al. (2019) analyze the comments that publications from a sample of university institutions were able to generate on Facebook. The authors reveal that messages using a friendly tone receive a higher volume of comments than those using a direct, rigid tone.

Finally, the study by Matosas-López and Romero-Ania (2020) explores the variables that allow more efficient management of university organizations on Twitter. The authors reveal that the use of links, hashtags, messages in the early morning or publications on gender equality issues contribute to increase audience interaction with the institution.

All these works consider platforms such as Facebook, Twitter, Instagram, LinkedIn, Google+ or MySpace. However, these last two have gradually lost importance in favor of the former, just as did other platforms considered in previous investigations (Cabero-Almenara and Marín-Díaz, 2014; Durán and

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Guerra, 2015; Espuny Vidal et al., 2011; Gómez-Aguilar et al., 2012; Laaser et al., 2012), for instance Hi5, MySpace, Tuenti, or Xing.

In addition, as can be seen in the third column of Table 1, the foregoing studies also show the variety of geographical locations considered in these investigations. Argentina, Ecuador, the United States, Spain, China, England, and Nigeria are just a few examples of countries whose university organizations have been the subject of study. In this regard, although Latin America and Europe are the regions where most studies have been carried out, we also find studies carried out in Africa, North America, and Asia.

### **Main Focus of the Chapter**

The present study, using a sample of university organizations from different regions around the world, aims to provide an overview of the social media marketing strategies used in different geographical locations.

For this purpose, the authors conduct a descriptive study of communication patterns implemented in university institutions from four regions: Africa and the Middle East, North America, Latin America, and Europe.

The study, which adopts a comparative format, contrasts the findings obtained in each of the aforementioned regions, highlighting the existence of both similarities and differences in the social media marketing strategies of the organizations observed.

In line with previous research (Guzmán Duque et al., 2013; Kimmons et al., 2017; Laudano et al., 2016; Matosas-López and Romero-Ania, 2020), the authors took Twitter as the social media platform to be monitored.

The relevance of social media marketing strategies is beyond question. However, despite this fact, relevant evidence on the way to improve these strategies is still necessary. In this sense, the literature review carried out by Saura (2021) have recently underline the need to generate insights on these techniques in order to improve the strategies implemented in this field.

The originality and main value of this study lies in the analysis of social media marketing strategies from an international approach and perspective. This research reveal the similarities and divergences in social media marketing strategies in different geographical locations. Addressing that the general paradigms followed on the planning of these strategies, probably require reformulation when they have to be adapted to the specific realities of the geographical locations where they are implemented.

## **METHODOLOGY**

### **Sample Design**

The selection of sampling elements took into account two of the most recognized rankings for assessing the activity of university organizations worldwide: the Webometrics list (Marciniak, 2013) and the Academic Ranking of World Universities (ARWU), also known as the Shanghai ranking (Túñez López et al., 2015).

The Webometrics ranking was taken as the starting point in the selection of sampling elements. This ranking, developed by the Cybermetry Laboratory of the Higher Council for Scientific Research (CSIC) in Spain, not only measures the web presence and visibility of higher education institutions worldwide



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but also offers a categorization by geographical region that satisfies the comparative objective of the study (assessment criteria shown in Table 2).

*Table 2. Webometrics ranking assessment criteria*

Assessment criteria	Description	Criteria weight
Presence	Size (n° of pages) of the institution's main web domain. It includes all the subdomains that share the same main web domain.	5%
Visibility	N° of external networks (subnets) linking to the institution's web pages (normalized and then average value).	50%
Transparency or openness	N° of citations from top 210 authors.	10%
Excellence or scholarship	N° of papers amongst the top 10% most cited in one of the 26 disciplines of the full database.	35%
<b>Total</b>		<b>100%</b>

Source: Webometrics

The information extracted from the Webometrics ranking was then screened by the authors using the ARWU global ranking. This ranking of universities, designed by a group of experts from the Shanghai Jiao Tong University, lists the 1000 most reputable universities worldwide (assessment criteria shown in Table 3).

*Table 3. ARWU ranking assessment criteria*

Assessment criteria	Description	Criteria weight
Quality of education	Alumni of an institution winning Nobel Prizes and Fields Medals.	10%
Faculty quality I	Staff of an institution winning Nobel Prizes and Fields Medals.	20%
Faculty quality I	Highly Cited Researchers.	20%
Research output I	Papers published in Nature and Science.	20%
Research output I	Papers indexed in Science Citation Index-Expanded and Social Science Citation Index.	20%
Per capita performance	Per capita academic performance of an institution.	10%
<b>Total</b>		<b>100%</b>

Source: ARWU

Researchers began with universities in the top 50 of the Webometrics rankings in each region (Africa and the Middle East, North America, Latin America, and Europe). After that, the authors checked whether these institutions appeared also in the ARWU global ranking. After this verification, we took the first ten universities in each region that met the following two criteria: (1) among the top 50 of their regions in the Webometrics list, and (2) among the top 1000 in the world according to the ARWU ranking. The ten universities selected for each of the four regions examined are presented in Table 4.

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For future investigations (after this work) only organizations that use English or Spanish to interact with their audiences were selected. This allows researchers to analyze text publications in the future. For the same reason, Asia, where university organizations tend to use the local language in their publications, was also eliminated for study purposes.

### **Data Extraction and Cleaning**

Once the sampling elements were selected, researchers extracted from the Twitter platform all content published during 2019 by the official accounts of the forty institutions. Following the procedure of previous studies (Alkadri et al., 2015; Quintana Pujalte et al., 2018), the data were extracted through Twitter's API using the service provider Twitonomy.

This process allowed the authors to gather a total of 137,463 publications. Of these messages, 98,169 were tweets originally created and published by the university, 26,483 were retweets from the account to third-party publications, and 12,811 were replies from the organization when mentioned by another user of its audience.

The compiled dataset was stored for cleaning, extracting a total of thirty-two indicators organized into five categories: (a) Publication volumes, (b) Publication components, (c) Publications by day of the week, (d) Publications by time slot, and (e) Followership (see Table 5).

From the thirty-two indicators extracted, those corresponding to categories (a), (b), (c), and (d) served to examine social media marketing strategies in the regions analyzed in the study. Likewise, the eight indicators in category (e) served to obtain a first impression of the success of these strategies in each region.

### **Data Analysis**

The authors, in line with similar research (Balan, 2017; Guzmán Duque et al., 2013; Matosas-Lopez, 2020; Valerio Ureña et al., 2014) in this field of study, applied descriptive analysis to the information collected.

The publications extracted for the selected sampling elements in each region were analyzed in an aggregated manner for the different areas (Africa and the Middle East, North America, Latin America, and Europe). All the analyses were conducted using the statistical software IBM SPSS in its version 26.

## **RESULTS**

The results of the descriptive exploration of the 137,463 publications analyzed are presented following the categorization in Table 5: (a) Publication volumes, (b) Publication components, (c) Publications by day of the week, (d) Publications by time slot, and (e) Followership.

Within each category, findings are presented in a disaggregated manner for each of the four regions under observation: Africa and the Middle East, North America, Latin America, and Europe.

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*Table 4. Universities by region and country*

<b>Region / University</b>	<b>Country</b>
<b>Africa and the Middle East</b>	
American University of Beirut	Lebanon
King Abdullah University of Science and Technology	Saudi Arabia
Stellenbosch University	South Africa
University of Cape Town	South Africa
University of Ibadan	Nigeria
University of Johannesburg	South Africa
University of KwaZulu-Natal	South Africa
University of Pretoria	South Africa
University of South Africa	South Africa
Wits University	South Africa
<b>North America</b>	
Columbia University	USA
Cornell University	USA
Harvard University	USA
Johns Hopkins University	USA
Massachusetts Institute of Technology (MIT)	USA
Stanford University	USA
University of California, Berkeley	USA
University of Michigan	USA
University of Pennsylvania	USA
University of Washington	USA
<b>Latin America</b>	
Catholic University	Chile
University of Buenos Aires	Argentina
University of Chile	Chile
Federal University of Minas Gerais	Brazil
Federal University of Rio de Janeiro	Brazil
Federal University of Rio Grande del Sur	Brazil
Federal University of Santa Catarina	Brazil
National Autonomous University of Mexico	Mexico
University of São Paulo	Brazil
State University of Campinas	Brazil
<b>Europe</b>	
Cambridge University	England
ETH Zurich (Swiss Federal Institute of Technology Zurich)	Switzerland
Imperial College	England
King's College London	England
Oxford University	England
The University of Edinburgh	Scotland
The University of Manchester	England
University College of London	England
University of Copenhagen	Denmark
Utrecht University	Netherlands

Source: Self-elaboration

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Table 5. Indicators extracted from the dataset

Category	Number of indicators	Indicator name
(a) Publication volumes	6	Tweets, Retweets, Replies, Daily Tweets, Daily Retweets, Daily Replies
(b) Publication Components	3	Mentions by post, Links by post, Hashtags by post
(c) Publications by day of the week	7	Post on Monday, Post on Tuesday, Post on Wednesday, Post on Thursday, Post on Friday, Post on Saturday, Post on Sunday
(d) Publications by time slot	8	Post 8:00 a.m. - 10:00 a.m., Post 11:00 a.m. - 13:00 p.m., Post 14:00 p.m. - 16:00 p.m., Post 17:00 p.m. - 19:00 p.m., Post 20:00 p.m. - 22:00 p.m., Post 23:00 p.m. - 1:00 a.m., Post 2:00 a.m. - 4:00 a.m., Post 5:00 a.m. - 7:00 a.m.
(e) Followership	8	Followers, Ratio followers / following, Tweets Retweeted, % of Tweets retweeted over total posts, Times each Tweet retweeted is retweeted, Tweets marked as favorite, % of Tweets marked as favorite over total posts, Times each Tweet marked as favorite is marked as favorite
<b>Total</b>	<b>32</b>	

Source: Self-elaboration

## Publication Volumes

With regard to the publication volumes, results in Table 6 show that universities in North America and Latin America carry out more intense activity than institutions in Africa and the Middle East or Europe. Such a situation can be seen in the indicators of Tweets and Retweets.

Conversely, the response indicator presents values that invite reflection. The regions of North America and Latin America, the most active in terms of Tweets and Retweets, are the ones that show the lowest average of Replies. This fact points to the existence of one-way messages in these locations.

Table 6. General publication volumes

Region	Tweets		Retweets		Replies	
	M	SD	M	SD	M	SD
Africa and Middle East	1655.50	1041.02	537.10	613.68	285.20	394.67
North America	2300.60	855.95	791.30	473.78	150.00	208.18
Latin America	2311.70	1119.97	381.80	458.06	222.20	330.36
Europe	1372.00	1070.01	323.70	207.72	333.30	513.42
<b>Total sample</b>	<b>1909.95</b>	<b>1069.65</b>	<b>508.45</b>	<b>480.28</b>	<b>247.67</b>	<b>369.88</b>

Source: Self-elaboration

The exploration of this same information in daily terms corroborates what is shown in Table 6. The universities analyzed in North America and Latin America have the lowest daily response ratios, with averages of 0.41 and 0.60, respectively. By contrast, the institutions in Africa and the Middle East or Europe show average response rates of 0.78, in the first case, and 0.91, in the second.

*Table 7. Daily publication volumes*

Region	Daily tweets		Daily retweets		Daily replies	
	M	SD	M	SD	M	SD
Africa and Middle East	4.52	2.84	1.47	1.68	0.78	1.08
North America	6.28	2.33	2.16	1.29	0.41	0.57
Latin America	6.31	3.059	1.04	1.25	0.60	0.90
Europe	3.74	2.92	0.88	0.56	0.91	1.40
<b>Total sample</b>	<b>5.21</b>	<b>2.92</b>	<b>1.39</b>	<b>1.31</b>	<b>0.67</b>	<b>1.01</b>

Source: Self-elaboration

## Publication Components

The information in Table 8 shows the degree to which the most characteristic components of Twitter publications are employed in each region.

As far as mentions are concerned, European universities make the most intensive use of this function with 0.86 mentions per publication. Additionally, links and hashtags reach their highest use levels in the case of Latin American universities, with averages of 0.73 and 0.71, respectively.

*Table 8. Publication components*

Region	Mentions by post		Links by post		Hashtags by post	
	M	SD	M	SD	M	SD
Africa and Middle East	0.33	0.26	0.39	0.20	0.65	0.81
North America	0.48	0.24	0.54	0.20	0.34	0.23
Latin America	0.45	0.37	0.73	0.19	0.71	0.92
Europe	0.86	0.46	0.46	0.16	0.64	0.38
<b>Total sample</b>	<b>0.53</b>	<b>0.39</b>	<b>0.53</b>	<b>0.22</b>	<b>0.58</b>	<b>0.64</b>

Source: Self-elaboration

These findings are in line with the results in Publication volumes' heading, at least as far as the European institutions are concerned. The organizations analyzed in Europe present the highest values in the response indicators, both in general terms and on a daily basis, a fact which indicates the existence of a dialogue between institution and target audience. In this regard, the mentions function, where European universities stand out, is also a mechanism of direct interaction between brand and audience.

## Publications by Day of the Week

Table 9 shows, again, the intensity level in posting activity, in this case presenting the information by day of the week.

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In the four regions, a clear cut between workdays and weekend days can be appreciated. This fact is reflected even in the institutions of Africa and the Middle East, areas where Muslim countries take, generally, their rest-day on Friday. Such would be the case in the organizations of Lebanon, Saudi Arabia and Nigeria listed in the sample. However, despite the above, there are no significant differences in this region, probably due to the international dimension of the institutions under observation.

Table 9. Average number of posts by day of the week

Region	Post on Monday	Post on Tuesday	Post on Wednesday	Post on Thursday	Post on Friday	Post on Saturday	Post on Sunday
Africa and Middle East	294.60	286.60	311.10	318.50	287.50	104.30	52.90
North America	341.00	385.60	393.90	404.50	388.7	221.90	165.00
Latin America	422.40	443.30	444.40	421.10	414.60	93.20	72.70
Europe	218.00	240.00	249.40	297.60	235.00	75.40	56.60
<b>Total sample</b>	<b>319.00</b>	<b>338.87</b>	<b>349.70</b>	<b>360.42</b>	<b>331.45</b>	<b>123.70</b>	<b>86.80</b>

Source: Self-elaboration

Regarding workdays, although it is true that no big variations between days were detected, there is a slight increase in the activity around the central part of the week (Wednesday and Thursday). This increase can be observed in all four regions under study.

## Publications by Time Slot

Concerning the time of publication, Table 10 indicates similar patterns of action in all zones. In the four regions, the bulk of the activity is concentrated in the morning and afternoon slots, from 8 a.m. to 4 p.m.

Table 10. Average posts by time slot

Region	Post 8:00 a.m. - 10:00 a.m.	Post 11:00 a.m. - 13:00 p.m.	Post 14:00 p.m. - 16:00 p.m.	Post 17:00 p.m. - 19:00 p.m.	Post 20:00 p.m. - 22:00 p.m.	Post 23:00 p.m. - 1:00 a.m.	Post 2:00 a.m. - 4:00 a.m.	Post 5:00 a.m. - 7:00 a.m.
Africa and Middle East	513.60	459.10	254.00	125.80	25.20	5.00	21.20	251.60
North America	506.40	610.40	533.70	365.10	169.80	24.20	1.60	89.40
Latin America	444.30	691.20	560.90	354.30	142.90	13.50	0.30	104.30
Europe	447.20	373.30	331.40	110.00	19.80	1.50	0.90	87.90
<b>Total sample</b>	<b>477.87</b>	<b>533.50</b>	<b>420.00</b>	<b>238.80</b>	<b>89.42</b>	<b>11.05</b>	<b>6.00</b>	<b>133.30</b>

Source: Self-elaboration

On the opposite side, what we call peak-off hours, the activity drops substantially in the 8 p.m. to 10 p.m. time slot, and falls down drastically between 11 p.m. and 4 a.m. This situation is also homogeneous for all the locations examined.

The exception to the aforementioned homogeneity in peak hours and peak-off hours is detected in the time slot from 5 a.m. to 7 a.m. This period indicates that activity seems to start earlier in the regions of Africa and the Middle East and Latin America.

## Followership

The fifth category of indicators includes those elements that can serve as a sign of the success obtained by the different social media marketing strategies in the regions analyzed. Table 11 provides an overview of the size of the organizations' target audiences in each zone. In this regard, universities in North America and Latin America seem to have significantly bigger target audiences than those observed for Africa and the Middle East or Europe. This fact can be seen not only in the average number of followers per account but also in the average ratio of followers / following per organization in each region.

*Table 11. Followers per organization*

Region	Average followers	Average ratio followers / following
Africa and the Middle East	120,198.40	358.14
North America	412,585.70	661.50
Latin America	393,387.50	989.06
Europe	151,049.80	187.50
<b>Total sample</b>	<b>269,305.35</b>	<b>549.05</b>

Source: Self-elaboration

Tables 12 and 13 present the recognition obtained by the publications of each institution in each region, on average. Table 12 displays acknowledgment obtained in terms of retweets, while Table 13 shows recognition achieved in terms of favorites.

The three retweet indicators are higher in North America and Latin America. In this point, perhaps the average percentage of Tweets that are retweeted over the total number of posts made by the university deserves special mention in Latin America. In this case, on average, 69.24% of posts are shared using the retweet function by members of the organization's audience.

*Table 12. Retweets obtained per organization*

Region	Average Tweets retweeted	Average % of Tweets retweeted over total posts	Average n° of times each Tweet retweeted is retweeted
Africa and Middle East	776.80	55.05	97.64
North America	1313.80	57.29	158.90
Latin America	1535.20	69.24	158.20
Europe	765.00	51.57	112.10
<b>Total sample</b>	<b>1097.70</b>	<b>58.29</b>	<b>526.84</b>

Source: Self-elaboration

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Regarding the favorite indicators, once again, the recognition achieved by the universities analyzed in North America and Latin America stands out from the rest. Here, as it happens with the equivalent indicator in Table 12, it is worth mentioning the acknowledgment obtained by publications in Latin America. In this case, publications from the organizations examined in the region, on average, were marked as favorites in 82.61% of cases.

Table 13. Favorites obtained per organization

Region	Average Tweets marked as Favorite	Average % of Tweets marked as favorite over total posts	Average n° of times each Tweet marked as favorite is marked as favorite
Africa and Middle East	950.80	66.63	249.80
North America	1465.40	63.70	584.97
Latin America	1830.60	82.61	422.45
Europe	955.00	61.45	273.60
<b>Total sample</b>	<b>1300.45</b>	<b>68.60</b>	<b>1530.82</b>

Source: Self-elaboration

## DISCUSSION

The importance of social network services in digital marketing strategies is undeniable. This fact is confirmed by the literature review on branding and marketing strategies in social media carried out by Cuevas-Molano et al. (2019). These authors examined articles indexed in the Web of Science (WOS) database over the previous fourteen years and underlined not only the existence of a mature and consolidated field of study, but also the relevance of a topic that concerns academics and professionals alike.

The dynamic and changing nature of these technologies forces brands and organizations to periodically analyze the data generated by these platforms, in order to extract the knowledge hidden therein. The millions of interactions that happen daily on social network services, between organizations and users, generate a huge volume of information that can be analyzed (Phillips et al., 2017).

In addition, social media marketing strategies are not homogeneous and universal, but depend on the market or sector, the target audience of the organization or the geographical area in which the actions are implemented (Matosas-Lopez, 2020). Thus, for example, a social media strategy can be efficient in one particular market and useless in a different sector. Similarly, a certain strategy can be appropriate in one geographical location and inadequate in another.

Different authors underline that social media marketing strategies, and media discourses, must be redefined and customized in accordance with the specific demands of markets or sectors, target audiences and geographical areas.

In this sense, Saura et al. (2021) emphasizes that organizations must personalize their publications based on the needs of their audiences. Scheffert (2011), for example, indicates that due to the digital revolution, marketing paradigms have drastically changed demanding higher levels of sophistication and personalization in the relationship between audience and organization. Park et al. (2011) address that, in the management of social media strategies, factors such as the interaction or the customization have a direct influence on brand loyalty indicators. Likewise, Tong and Chan (2020) underline that, in the



digital era, market-oriented approaches are essential in the relationship with our target audience in social network services.

In addition, some studies suggest that these platforms require professionalized management systems and that their management cannot be left to non-specialized professionals (Casanoves Boix et al., 2018; Laaser et al., 2012). Other authors claim that organizations manage these technologies without a defined strategic vision (Laudano et al., 2016). In the same line, there are also studies which indicate that organizations should not settle for using their accounts to build their institutional image, but must also protect their reputation (Gureeva, 2018). Certain authors even assert that properly managed social media can become a powerful recruitment tool (Guzmán Duque et al., 2013).

The findings in this study provide academics and professionals with a good overview of social media marketing strategies that can be effective in different geographical locations around the world.

## **Publication Volumes**

In terms of publication volumes, while strategies in North America and Latin America display the highest volume of Tweets and Retweets, the regions of Africa and the Middle East and Europe stand out for their response ratios.

These findings corroborate the results of Chen (2011) in his research on uses and perks on Twitter. Study in which the author points out that a high volume of posts acts as a motivating element that encourages the subject to interact with other users. Nevertheless, the low response rate in the American regions indicates more unidirectionality in the social media marketing strategies employed in these areas.

## **Publication Components**

As far as publication components are concerned, European strategies emphasize the use of mentions, while Latin American universities accentuate the use of links and hashtags.

Authors such as Túñez López et al. (2015) and Guzmán Duque et al. (2013) have stressed the importance of links and hashtags in social media strategies. Examining the role of social networks as communication channels, they highlight the potential of these elements in facilitating promotion and projection of the organization in front of its target audiences.

However, Latin America's prioritization of link and hashtag use in preference to mentions' (traditional indicator of dialogue), seems to corroborate the previously mentioned unidirectionality of their social media marketing strategies.

## **Publications by Day of the Week**

Day of publication, unlike the previous aspects of publication volume and publication components, does not show variations between regions. In all cases, the strategies applied concentrate the activity on workdays, in general, and on Wednesdays and Thursdays, in particular.

These results are in line with studies by Túñez López et al. (2015) and Valerio Ureña et al. (2014), where the authors emphasized the importance of publication frequency in the central part of the week. Nonetheless, these findings contradict the research of Hanifawati et al. (2019) on brand management in Facebook, where no significant differences were observed regarding day of publication, within workdays.

## **Publications by Time Slot**

Concerning time of publication, just as with day of publication, there is also homogeneity between areas. In the four regions under study, most of the activity is concentrated in the morning and afternoon time slots, more specifically between 8 a.m. and 4 p.m.

These results are aligned with the findings of Hanifawati et al. (2019) and Valerio Ureña et al. (2014) mentioned above. These studies underline that strategies with high publication frequencies in the first part of the day tend to be positively perceived by the organization's target audience.

## **Followership**

Finally, regarding audience response, the results show that in North America and Latin America not only did brands achieve greater followership on the platform, but also more user proactivity than in Africa and the Middle East or in Europe.

This fact confirms what has been stated by previous studies on marketing and communication-related strategies in Latin American university institutions (Cabrera and Camarero, 2016; Guzmán Duque et al., 2012; Laudano et al., 2016; Puertas Hidalgo and Carpio Jiménez, 2016). These studies always stress the importance and weight of social network services in institutional strategies.

## **CONCLUSION**

Certain aspects of social media marketing strategies are universal and are managed similarly in different regions worldwide. Examples from our study were days of the week and times of publications. However, we can also identify aspects where important differences were detected, depending on the geographical area analyzed.

In this regard, it is worth mentioning that publication volumes were notably higher in North America and Latin America than in the locations of Africa and the Middle East, and Europe. Such a situation of heterogeneity in social media marketing strategies can also be seen in the publication components. While in Latin America the use of links and hashtags was prevalent, organizations in Europe put emphasis on the use of mentions. These nuances were also detected in the followership achieved by organizations, more intensive in North America and Latin America than in Africa and the Middle East, or in Europe.

The originality and main value of the present research lies in the international approach and perspective applied by the authors. The findings obtained in the present study lead us to reflect on differences in social media marketing strategies in different regions worldwide.

While strategies in social network services should be based generally on dialogue and interaction with the organization's target audience, this point can be more or less critical depending on the geographical region in which the brand operates. While Europe confers great importance on the organization's interaction with its audience (proof of this is the intensive use of replies and mentions), both North America and Latin America tolerate a greater degree of one-way communication. This is illustrated in that followership does not appear to be affected despite the lower degree of dialogue observed, according to the indicators analyzed during the study.

All the foregoing, then, leads to the conclusion that the paradigms governing the definition of social media marketing strategies at the global level, a priori universal, probably must be reformulated to fit on the particular realities of the regions where these strategies are applied.

## **Professional and Managerial Implications**

In light of the findings obtained, the next professional-managerial implications can be pointed out for the design and implementation of social media marketing strategies.

In first place, the acceptance of our audience to a certain bulk of daily publications may differ considerably depending on the geographical location. Secondly, the volume of mentions, links, and hashtags per publication may have better or worse acceptance, depending on the region in which our organization operates. Consequently, each organization must identify the adequate management patterns in accordance with its geographical location and its audience.

In conclusion, it can be said that management approaches in social media marketing strategies are influenced, among other variables, by the geographical area of the organization and its target audience. This situation forces marketing managers, in general, and social media managers and community managers, in particular, to develop a significant effort to adapt and customize their actions.

## **Limitations and Future Research**

Finally, several limitations and prospects for future research can be addressed. Firstly, the investigation covers Africa and Middle East, North America, Latin America, and Europe; however, no geographical location is considered in Asia. Unfortunately, the platform monitored (has it happens with other social network services) has a scarce presence in many of the territories of the Asian continent, which makes it impossible to carry out a comparative analysis under identical conditions. Future research should look for social media platforms with a minimal coverage in the Asia region, in order to expand this comparative analysis from an, even more, international perspective, if possible.

In second place, this research examines exclusively university organizations, ignoring other sorts of organizations. Therefore, future research should take into consideration, for instance, the analysis of social media marketing strategies in business organizations. This type of study would allow to expand the knowledge generated in the present study, revealing to what extent the findings obtained here can be extrapolated to other forms of organizations and target audiences.

Despite these limitations, the present study, in the authors' opinion, offers, academics and professionals, knowledge of relevance, addressing in addition new opportunities for future research.

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## **KEY TERMS AND DEFINITIONS**

**Engagement:** Degree of emotional involvement that organization's followers have with the organization.

**Followership:** Intentional practice of someone in a subordinate role to enhance the synergetic interchange between the follower and the organization.

**Hashtag:** Word or phrase, preceded by a sign (#), used on social network services to identify digital content on a specific topic.

**Media Prosumer:** Term created to define the typical user of social network services.

**Prosumer:** Term created to define the typical user of mass media.

**Target Audience:** Group of subjects most likely to want a product or service, and therefore, the group of people who follow the organization.

**Uses and Gratifications Theory (U&G):** Conceptual framework used to describe how audiences interact with mass media.

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## About the Contributors

**Jose Ramon Saura** research has focused on the theoretical and practical insights of various aspects of User Generated Content (UGC), with a specific focus around three major research approaches applied to business and marketing: data mining, knowledge discovery and information sciences. International Ph.D. in Business Economics at the Rey Juan Carlos University, London South Bank University (LSBU) and Harvard University (RCC). He is a Marketing Lecturer of the Department of Business Economics at the Rey Juan Carlos University, lecturing at the Faculty of Social Science and Law of Madrid. He has published articles focused on areas such as Business, Management, Computer Sciences, Multidisciplinary or Information Sciences, among others. His research has appeared in leading international journals such as the Journal of Business Research, International Journal of Information Management, Journal of Business & Industrial Marketing, Review of Managerial Sciences, Journal of Innovation and Knowledge, Journal of Mobile Communication, IJERPH or IEEE Access. Jose Ramon Saura serves on editorial and reviewer boards of a number of business and information sciences journals.

\* \* \*

**Roberto Baelo Alvarez** is a Senior Lecturer/Associate Professor (Department of General and Specific Didactics and Educational Theory) and the current Vice-Rector/Vice-President/Pro-Vice-Chancellor for Internationalisation at the University of León. Ph.D. in Psychology and Educational Sciences. He is leading the inter-university research educational group “EduTools”. His teaching and research activities are linked to promoting methodological innovations through the integration in the education of the Information and Communication Technologies (ICT). He has participated in a large number of research projects financed by national and international governmental entities. Besides, he has also taken part in several projects of educational innovation. All this activity has been reflected in his publications, related to methodological innovations, teacher training programs, the integration of ICT in education, as well as with the counseling, guidance, quality, and equity in education, just as attention to diversity. He is part of the scientific committee of several national and international journals and he has taken part in prestigious conferences and workshops. He participates in numerous editorial boards and is a usual reviewer for renowned national and international journals. Moreover, the National Committee that evaluates the investigative activity of Spanish researchers, which belongs to the Spanish Ministry of Education, has evaluated positively his research and knowledge transfer activities.

**Belem Barbosa** received her PhD in Business and Management Studies – Specialization in Marketing and Strategy from the University of Porto, Portugal. She is Assistant Professor at the School of Economics

### **About the Contributors**

and Management of the University of Porto. She is full researcher at GOVCOPP, the Research Unit of Governance, Competitiveness, and Public Policies, and Invited Researcher at cef.up Center for Economics and Finance at the University of Porto. Her research interests lie primarily in the area of consumer behavior, including word-of-mouth communication, internet marketing and sustainability marketing.

**Margaret Bruce** is Director of the Brandmovers Institute for Digital and Creative Economy and Professor of Digital Strategy at London South Bank University. Her previous roles include Deputy Vice-Chancellor of Derby University, leading research, innovation and enterprise, and Pro Vice-Chancellor of UCLan, leading research and innovation. She has also worked as a research professor at Manchester University, where she produced eight books and over 200 papers relating to design and innovation management, fashion marketing and branding. Professor Bruce has received a number of honorary professorships in recognition of her academic contribution.

**Neslihan Cavlak** is a senior lecturer at Tekirdag Namik Kemal University, department of Tourism and Hotel Management. She holds a PhD degree on Marketing. She has an experience of 15 years in lecturing. She is the author of numerous articles specifically dealing with marketing issues. She has given speeches at leading marketing conferences.

**Ruziye Cop** is a professor of marketing at Bolu İzzet Baysal University, Faculty of Economics and Administrative Sciences, Bolu-Turkey. She holds a PhD degree on Marketing. She is the author of numerous articles specifically dealing with marketing issues. She has given speeches at leading marketing conferences.

**Eloísa Díaz Garrido** has a PhD in Economic and Business from the Rey Juan Carlos University (Madrid- Spain). She has been a professor at the Faculty of Legal and Social Sciences of the Rey Juan Carlos University (Madrid) since 1998. She teaches subjects related to Production and Operations Management and Business Management in different Undergraduate and Postgraduate Degrees. His line of research focuses on the strategy of operations in both industrial and service companies, environmental management and the management of service companies and service processes in manufacturing companies, as well as the Servitization process as a strategic decision of industrial companies, generating value by incorporating services into products. She is a member of the URJC's GES2ME group of excellence in Service Science, Management and Engineering. She has participated as a researcher in Research Projects and Contracts of the National Plan granted by the Ministry of Science and Innovation and Projects of the Community of Madrid, focused on topics consistent with her research lines. She has presented different communications and papers at national and international conferences. She is the author of different publications in national and international journals and books since 2000.

**Vera Gelashvili** is an Assistant Professor of the Business Economics Department at King Juan Carlos University. She was graduated in Economics and Business Administration and she was doctorate with honours at the Complutense University of Madrid in June 2017. Previously she has completed a Master of Research in Business Management, Marketing, and Accounting in Business Administration Faculty, Complutense University of Madrid. She is the author of several papers and book chapters and presented her research in the National and International Congress and Workshops. Member of the research group INIFCO-UCM.

**Vasco Paço Gomes** earned his Master in Marketing from the University of Aveiro. His main research interest management control and performance indicators.

**Charles Graham** is an associate professor in Marketing at London South Bank University Business School and an adjunct research fellow at the Ehrenberg-Bass Institute, University of South Australia. His research interests include long-term behavioural brand loyalty, competitive market structure modelling and effective brand portfolio management. Before becoming an academic, Charles spent nearly 15 years marketing national and international grocery and foodservice brands.

**Rocío López Muniesa** is a PhD candidate in fashion marketing at Rey Juan Carlos University.

**Ammarah Marjan** is a doctoral researcher and associate lecturer in Marketing at London South Bank University Business School. Her research focuses on online loyalty programmes and involves the scientific replication and extension of empirical norms to the management of loyalty relationships in the customer base. Prior to her career in academia, Ammarah worked as a trade marketer at Nestlé S.A., where she designed strategies to increase the sales and visibility of Nestlé brands in key local and international accounts.

**Rubén Martínez-Alonso** is a Junior Researcher in the Economics and Business Department at the University of Almería, Spain. He collaborates with the Family Business Chair at this University. His primary research interests include family firm research focusing on emotional, innovative, management, and finance aspects. He has published his latest research findings in international journals such as *Review of Managerial Science*, *Business Research Quarterly BRQ*, *European Journal of Innovation Management*, *International Journal of Entrepreneurship and Small Business* and, *Management Research: Journal of the Iberoamerican Academy of Management*.

**María J. Martínez-Romero** is an Assistant Professor of Accounting and Finance in the Economics and Business Department at the University of Almería, Spain. She collaborates with the Family Business Chair at this University. Her primary research interests include family firm research focusing on emotional, innovative, finance and corporate governance aspects. She has published her latest research findings in international journals such as *Small Business Economics*, *Review of Managerial Science*, *Business Research Quarterly BRQ*, *European Journal of Innovation Management*, *Spanish Accounting Review*, *Canadian Journal of Administrative Science*, *International Journal of Entrepreneurship and Small Business* and, *Management Research: Journal of the Iberoamerican Academy of Management*.

**Luis Matosas-López** earned a PhD in Economics, Master in Marketing, and Graduate in Business Administration, all at Rey Juan Carlos University. Luis Matosas López has made more than twenty highly relevant publications, all of them related to the use of ICTs and their implications in the management of different types of organizations. These publications include articles published in journals indexed in JCR-Wos and SJR-Scopus (Q1 to Q3) as well as different book chapters in publishers such as McGraw Hill, Tirant Lo Blanch, Pirámide, or Tecnos, among others. His teaching focuses on the development of ICT skills applied to management. Applications such as Excel or Access, CRM (Customer Relationship Management) and ERP (Enterprise Resources Planning) solutions are the central core of their courses.

## **About the Contributors**

Before starting his career as teacher and researcher, he worked for several years at Vodafone Spain and France Telecom (Orange) in the Marketing and Business Intelligence departments, respectively.

**Juan Mejía-Trejo** received his PhD in Management Sciences from the Instituto Politécnico Nacional in 2010. He is former Manager of Teléfonos de México (1987-2008). In 2010 he was hired as Research Professor in Management Innovation at the Universidad de Guadalajara and since 2015 is currently the Management Sciences Coordinator. Since 2010 is a member of the National Researchers System of the National Science and Technology Council (CONACYT). He writes and presents widely on innovation issues, publishing articles in SSRN, Researchgate, Academia.edu, Google Academics and several important portals and other book titles in Alfaomega and Patria editorials. His ORCID is 0000-0003-0558-1943.

**Andrew Mitchell** has over 25 years of global digital engagement experience with some of the world's leading marketers, and has worked on digital promotions for a diverse portfolio of global clients. His areas of expertise span multiple industries, including consumer goods, entertainment, retail, travel and financial services. Andrew earned his doctorate for studies in identifying and developing digital technology that can be deployed and measured across various digital and social media channels. Dr Mitchell founded Brandmovers in 2003 and has since expanded across multiple continents and industries. He is a Chartered Marketer and a graduate of Manchester University and the Harvard Business School.

**Zaila Oliveira** received her PhD in Management and Business – Specialization in Marketing and Strategy from the University of Porto, Portugal. She teaches undergraduate and postgraduate courses at Christus University Center-UNICHRISTUS and Fametro University Center-UNIFAMETRO. Her research interests include marketing, tourism, entrepreneurship, and social responsibility.

**Paula Adriana Padilla** researches digital marketing and the use of digital technology in the interaction with customers. She is specialized in Marketing of Services & Business. Paula González-Padilla held positions of project manager and made consultancy at a number of other private companies.

**Alberto Prado Román** is a professor at the Rey Juan Carlos University in Madrid (Spain), in the Department of Business Economics, within the area of Marketing and Market Research. PhD. in Business Economics. Master's degree in Marketing. Participation in prestigious projects developed by the Royal Academy of Economic and Financial Sciences, or by the Spanish Agency for International Cooperation, among others. Author of several articles published in prestigious journals, such as *Revista de Administração de Empresas* or *Revista Europea de Dirección y Economía de la Empresa*, and publishers, such as Springer. Member of the organising committee of national and international conferences of the AEDEM academy. He has taught in specialization and master courses, such as the Specialist Course in Sports Management or the University Master's Degree in Executive Management.

**Miguel Prado Román** is a professor at the Rey Juan Carlos University in Madrid (Spain), in the Department of Business Economics, within the area of Accounting and Finance. PhD. in Business Economics. Master's degree in Auditing and Higher Accounting. Participation in prestigious projects developed by the Royal Academy of Economic and Financial Sciences, or by the Spanish Agency for International Cooperation, among others. Author of several articles published in prestigious journals, such as *Revista de Administração de Empresas* or *Revista Europea de Dirección y Economía de la Empresa*,

and publishers, such as Springer. Member of the organising committee of national and international conferences of the AEDEM academy. He has taught on specialisation and master's courses, such as a specialist course in Sports Management, University Master's Degree in Senior Management or University Master's Degree in Auditing and Higher Accounting.

**Beatriz Rodríguez Herráez** is a professor of Marketing, Faculty of Economics and Business Administration at the University Rey Juan Carlos, Spain. She obtained a doctor's degree for the University Complutense of Madrid, doctoral thesis realized with a scholarship granted by the General Secretary of Tourism. She is the main investigator of the group EcoTuG (Economic, Tourism and gestion). Has published more than 30 publications on tourism, marketing and communication in magazines and national and international books. Nowadays it centres her investigation on the commercial communication and the corporate social responsibility.

**Daniel Rodríguez-Rodríguez** is a recent graduate student in the Business Administration and Management Degree at the University of Almería.

**Sandrina Francisca Teixeira** is a lecture at Porto Accounting and Business School/ Polytechnic Institute of Porto. She holds a PhD in Communication and Advertisement. At the moment, she is the director of the Master in Digital Marketing. She coordinates the CEOS Marketing and Digital Communication Strategies research line and is the Head of CEOS.PP - Centre for Organizational and Social Studies of Polyethnic of Porto. Her main research field is marketing and digital marketing. The main research projects are Behaviour of the Digital Consumers; Digital marketing; Accountability and Communication in Local Government. She has published in national and international journals. In addition, she is the project coordinator of TACLARO: Transparency, Accountability and Communication in local public administration. She participated in several projects and has participated in national and international conferences and, she also has scientific collaborations as a peer reviewer in national and international journals and conferences.

**Carlota Zori**, as a Business Consultant in the CRM area, is responsible of the Deployment team of CRM Dynamics in EMEA region. She worked also as Key Account Manager and she has been the responsible of international expansion department on a company of health and beauty sector.

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