

# Toward a theory of customer engagement marketing

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**Abstract** Customer engagement marketing—defined as a firm’s deliberate effort to motivate, empower, and measure customer contributions to marketing functions—marks a shift in marketing research and business practice. After defining and differentiating engagement marketing, the authors present a typology of its two primary forms and offer tenets that link specific strategic elements to customer outcomes and thereby firm performance, theorizing that the effectiveness of engagement marketing arises from the establishment of psychological ownership and self-transformation. The authors provide evidence in support of the derived tenets through case illustrations, as well as a quasi-experimental field test of the central tenet of engagement marketing.

**Keywords** Customer engagement · Marketing strategy · Task-based engagement · Experiential engagement · Quasi-experiment

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Whether intrinsically or extrinsically motivated, guided or unguided by the firm, customers are now active contributors to a wide variety of marketing functions (e.g., customer acquisition and retention, product innovation, marketing communication, merchandising) (Malthouse et al. 2013; Nambisan 2002). They are pseudo-marketers, often with greater influence, lower costs, and more effective reach than their firm-based counterparts (Kozinets et al. 2010). This transfer of control to the customer can be a significant threat or potential opportunity for firms. This has led to an explosion of interest in “customer engagement,” which, in the past decade, has gone from a completely unused term (0 hits prior to 2007) to a topic that raises more than 6 million Google search hits. Consequently, firms are devoting substantial resources in an effort to steer customer engagement strategically; often hiring full-time managers (e.g., Director of Customer Engagement) (Verhoef et al. 2010). For example, Anheuser-Busch is expected to spend more than \$200 billion annually on engagement marketing strategies, beginning in 2017 (Barris 2015). Yet confusion about the meaning of customer engagement is nearly as ubiquitous as its use, and research on customer engagement remains scarce and fragmented. The question thus remains, “How can firms strategically guide customer engagement in ways that benefit their performance?” *Accordingly, the goal of this article is to present an emerging theory of customer engagement marketing and provide a foundation for the use of customer engagement to achieve marketing objectives.*

As a first step, we explicitly delineate *customer engagement*, a customer outcome, as distinct from *customer engagement marketing* (henceforward, engagement marketing), which refers to a firm’s strategic efforts. Engagement marketing represents the firm’s deliberate effort to motivate, empower, and measure a customer’s voluntary contribution to its marketing functions, beyond a core, economic transaction (i.e., customer engagement). It actively enlists customers to serve as pseudo-

marketers for the firm. Effective engagement marketing can reduce acquisition costs, promote customer-centric product innovations, and enhance post-purchase service quality (Malthouse et al. 2013; Nambisan 2002). It can provide a means to monitor behaviors outside the core transaction, to capture a more holistic view of the customer and more accurate measures of customer value (Kumar 2013), as well as enhancing customer satisfaction, loyalty, and, ultimately, firm performance (Ranjan and Read 2016; Rapp et al. 2013).

This research takes several steps to provide a foundation for engagement marketing. We review marketing literature and detail various explicit or implicit meanings of customer engagement, to distill the essence of this foundational construct as a customer's voluntary contributions to a firm's marketing functions. Implicit in this conceptualization of customer engagement is the idea that customers have something of value to add to the firm, beyond their financial patronage, so we present a defense of four customer-owned resources—network assets, persuasion capital, knowledge stores, and creativity—that underlie engagement marketing. Then, building on the foundational understanding of *customer engagement*, we define *engagement marketing*. Next, we present a conceptual model to position engagement marketing in a nomological network and identify two paths through which engagement marketing drives long-term customer engagement. We use this model to derive tenets for employing engagement marketing to achieve firm objectives, as well as advance research in the domain. Empirical tests of each tenet are beyond the scope of this article, but we provide some illustrative business cases and a quasi-experimental field test of the proposed foundations. Finally, we outline research directions that emerge from this newly proposed theory of engagement marketing.

With these efforts, our research makes several key contributions. First, we distill the essence of customer engagement to provide a foundation for examining engagement marketing. We identify its universal characteristics, differentiate it from other marketing strategies, and offer a descriptive typology of two types of engagement marketing (task-based and experiential). All engagement marketing shifts control over some aspect of a firm's marketing functions, from the firm to the customer, and depends on the firm's ability to identify and leverage customer-owned resources (network assets, knowledge stores, persuasion capital, creativity). Task-based engagement initiatives go beyond the economic transaction and use structured, and often incentivized, tasks to guide customers' voluntary contributions to marketing functions (e.g., write a review, refer a customer, provide support to other customers). Experiential engagement initiatives instead reflect the firm's attempts to drive pleasurable experiences with customers outside the core transaction, such that these events motivate voluntary, autonomous customer contributions. Extant literature typically theorizes about each specialized form of engagement marketing separately (e.g., word-of-

mouth marketing, crowdsourcing, brandfests); we integrate these forms to provide a more parsimonious theoretical foundation for understanding engagement marketing.

Second, we develop a conceptual model and identify two tenets, with corresponding propositions, that capture the theoretical essence of how engagement marketing affects participating customers. Engagement marketing has a twofold influence on long-term customer engagement (beyond participation in the initial initiative). First, engagement marketing can enhance the experience of the core offering, a key driver of customer engagement, by strengthening existing psychological connections to the core offering (e.g., task-based) and by building new, diverse connections (e.g., experiential). Second, both task-based and experiential engagement initiatives can drive long-term customer engagement by transforming the customer's perception of the self in relation to the firm. Thus, engagement marketing can drive long-term customer engagement through transformation of the experience of the core offering and customer self-transformation.

Third, we provide illustrative cases to support our proposed tenets, along with a preliminary empirical test of our conceptual model. Because the long-term success of an engagement marketing initiative is predicated on its ability to transform the customer from a passive receiver of the firm's marketing offering to an active contributor to the firm's marketing functions, a successful initiative should facilitate this self-transformation. We test this foundational prediction with a quasi-experimental field study in which we investigate the effects of an engagement initiative on customer engagement. It reveals that experiential engagement initiatives facilitate the transformation of the participating customer's perception of self, which in turn increases customer engagement.

### Theoretical assessment of customer engagement marketing

A frenzy of rapid growth and creative energy has marked recent research on customer engagement (Bowden 2009; Kumar 2013; Van Doorn et al. 2010; Vivek et al. 2012), generating a significant amount of knowledge but also considerable variation in the definitions, concepts, and arguments used to examine the construct. This variation can become problematic. Without definitional precision, operationalization and differentiation from other marketing constructs is arduous or impossible. Replicating findings is difficult and contradictory findings are inevitable making theory testing challenging and hindering the development of the domain. Thus, these foundational constructs must be “narrow enough to strip away unintended connotations and surplus meaning but ... conceptually broad enough to capture the underlying essence of the phenomenon” (Suddaby 2010, p. 347–48). Therefore, in

approaching a theory of engagement marketing, we begin with the recognition that, even despite some underlying similarities, many diverse viewpoints exist and must be reconciled.

A primary challenge related to diverse viewpoints on customer engagement is that the term is often used interchangeably to refer to both firm strategies and customer responses, construed as “activities initiated by ... the organization” (Vivek et al. 2012, p. 127) and as “customer behavioral manifestations toward the brand or firm, beyond purchase” (Van Doorn et al. 2010, p. 253). In response to this conundrum, we begin by disentangling customer engagement, a desired customer outcome, from engagement marketing, which is a firm’s strategic efforts. With an inductive approach, we review influential theoretical statements and recent empirical work to distill the unique essence of customer engagement: the desired outcome of engagement marketing. Figure 1 provides a visual summary of relationships among the key constructs; Table 1 details the implicit and explicit meanings of customer engagement in extant research.

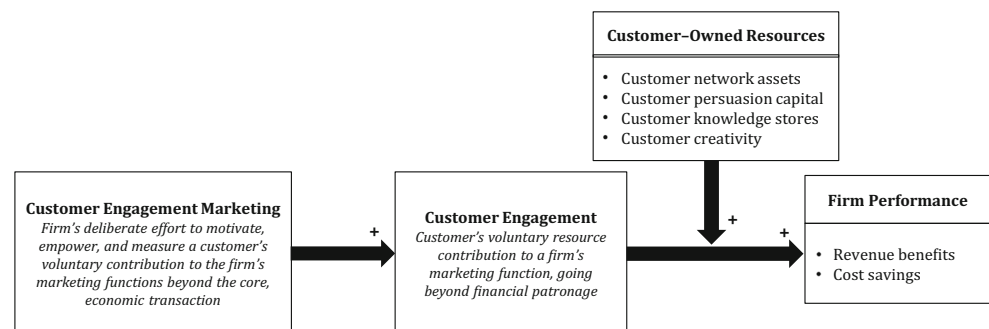
### What is customer engagement?

In an attempt to consolidate diverse viewpoints and build a strong foundation for conceptualizing engagement marketing, we first contemplate the merits of the unique perspectives on customer engagement. It has been construed as either behavioral or psychological (Hollebeek 2011; Jaakkola and Alexander 2014), though a general consensus indicates that it is a customer’s behavioral response to a firm, going beyond what is necessary for the core economic transaction (Van Doorn et al. 2010). Specifically, it is “activities engaged in by the consumer that are not directly related to search, alternative evaluation, and decision making involving brand choice” (Vivek et al. 2012, p. 128). Curiously, many researchers claiming a psychological perspective emphasize its interactive nature asserting that “customers choose to invest ... resources in particular brand interactions,” thus, implying a behavioral component (Hollebeek et al. 2016, p. 3; see also Brodie et al. 2011). Defining it behaviorally rather than

psychologically may be preferable; it does not preclude the relevance of psychological constructs (e.g., involvement, satisfaction, brand love, cognitive and affective commitment) but rather allows these constructs to fluctuate independently, with unique antecedents and consequences, and relate to customer engagement as either a key antecedent or outcome (Pansari and Kumar 2016). Defining customer engagement as behaviors *outside the core transaction* also has the benefit of clearly distinguishing the concept from behavioral loyalty (i.e., repeat purchases) and other transaction-focused behaviors frequently studied in marketing (Dick and Basu 1994). Yet, construing it as *any* activity beyond purchase subsumes a wide variety of customer behaviors (e.g., product returns, product usage, product disposal, brand learning), potentially at the expense of retaining surplus meaning that could dilute the effectiveness of the term. Thus, we argue that a behavioral conceptualization of customer engagement better captures its implicit and explicit meaning and also that narrowing and clarifying this definition can help establish more effective “building blocks for strong theory” (Suddaby 2010, p. 347).

**The essence of customer engagement** Taking an inductive approach, we turn to examples used previously to illustrate customer engagement. In particular, it has been construed as “word of mouth, blogging, [or] providing customer ratings” for a product or brand (Verhoef et al. 2010, p. 249). Other sources suggest it is “customer *contributions* of resources such as knowledge, skills, and time, to facilitate the focal firm’s development of its offering” (Jaakkola and Alexander, p. 255, emphasis added) or “customer recommendations and referrals ... webpostings ... and many other behaviors *influencing* the firm and its brands” (Van Doorn et al. 2010, p. 253, emphasis added). It is relevant in contexts where “customers can cocreate value, cocreate competitive strategy, collaborate in the firms innovation process, and *become endogenous to the firm*” (Bijmolt et al. 2010, p. 341, emphasis added). Jaakkola and Alexander (2014, p. 248) thus suggest that customer engagement is “behaviors through which customers make *voluntary resource contributions* that have a brand or firm focus but go beyond what is fundamental to the transaction.”

**Fig. 1** Visual representation of key constructs in customer engagement marketing



**Table 1** What is customer engagement? Implicit and explicit perspectives

Sources	Customer engagement	Typologies/examples	Marketing functions
Kumar and Pansari (2016)	“the attitude, behavior, the level of connectedness (1) among customers, (2) between customers and employees, and (3) of customers and employees within a firm” (p. 2)	<ul style="list-style-type: none"> <li>• Customer purchases (e.g., posting content on social media, inventing alternate uses for products)</li> <li>• Customer referrals</li> <li>• Customer influence (e.g. word of mouth)</li> <li>• Customer knowledge (e.g., feedback and ideas for innovations and improvements)</li> </ul>	<ul style="list-style-type: none"> <li>• Customer acquisition, expansion, and retention</li> <li>• Product innovation</li> </ul>
Hollebeek et al. (2016)	“A customer’s motivationally driven, volitional investment of focal operant resources (including cognitive, emotional, behavioral, and social knowledge and skills), and operand resources (e.g. equipment) into brand interactions in service systems (p. 6)”	<ul style="list-style-type: none"> <li>• Customer resource integration</li> <li>• Customer knowledge sharing (e.g., sharing information or experience with others)</li> <li>• Customer learning (e.g., customer socialization, education, training, post-purchases learning)</li> </ul>	<ul style="list-style-type: none"> <li>• Customer acquisition, expansion, and retention</li> <li>• Product innovation</li> </ul>
Jaakkola and Alexander (2014)	“behavior through which customers make voluntary resource contributions that have a brand or firm focus but go beyond what is fundamental to transactions” (p. 248)	<ul style="list-style-type: none"> <li>• Augmenting behaviors (e.g., posting content on social media, inventing, alternating alternate uses for products)</li> <li>• Co-developing behaviors (e.g., customer support, ideas for new or improved products, involvement in product development and innovation)</li> <li>• Influencing behaviors (e.g. word of mouth, blogging, recommendations, referrals, customer-to-customer interaction)</li> <li>• Mobilizing behaviors (e.g., recruitment, boycotts)</li> </ul>	<ul style="list-style-type: none"> <li>• Customer acquisition, expansion, and retention</li> <li>• Marketing communication</li> <li>• Product innovation</li> </ul>
Verleye et al. (2013)	“voluntary, discretionary customer behaviors with a firm focus... customers’ interactive, cocreative experiences with a firm” (p. 69)	<ul style="list-style-type: none"> <li>• Compliance (e.g., showing respect to employees, following organizational rules and procedures)</li> <li>• Cooperation (e.g., providing information and assistance to employees )</li> <li>• Feedback (e.g., suggestions for product improvements, participation in new product development)</li> <li>• Helping other customers (e.g., encouraging other customers to show appropriate behaviors, helping others to have better service experiences)</li> <li>• Positive word of mouth (e.g., recommendations, referrals)</li> </ul>	<ul style="list-style-type: none"> <li>• Customer acquisition, expansion, and retention</li> <li>• Product innovation</li> </ul>
Vivek et al. (2012)	“beyond the purchase. .. events and activities engaged in by the consumer that are not directly related to search, alternative evaluation and decision making involving brand choice” (p. 127)	<ul style="list-style-type: none"> <li>• Feedback to marketers, consumers, and society</li> <li>• Participation in activities (e.g., skill development activities and events, creative events, online activities, product innovation and development events, workshops)</li> <li>• Word of mouth</li> </ul>	<ul style="list-style-type: none"> <li>• Customer acquisition, expansion, and retention</li> <li>• Product innovation</li> </ul>
Brodie et al. (2011)	“psychological state that occurs by virtue of interactive, cocreative customer experiences with a focal agent/object (e.g., a brand) in focal service relationships” (p. 9)	<ul style="list-style-type: none"> <li>• Cognitive</li> <li>• Emotional</li> <li>• Behavioral</li> </ul>	<ul style="list-style-type: none"> <li>• Customer acquisition, expansion, and retention</li> <li>• Marketing communication</li> <li>• Product innovation</li> </ul>
Hollebeek (2011)	“the level of an individual customer’s motivational, brand-related and context-dependent state of mind characterized by specific levels of cognitive, emotional and behavioral activity in direct brand interactions” (p. 790)	<ul style="list-style-type: none"> <li>• Cognitive activity (e.g., level of concentration and /or engrossment in the brand)</li> <li>• Emotional activity (e.g., level of brand-related inspiration and/or pride)</li> <li>• Behavioral activity (e.g., level of energy exerted in interacting with a focal brand)</li> </ul>	<ul style="list-style-type: none"> <li>• Customer acquisition, expansion, and retention</li> <li>• Marketing communication</li> </ul>
Bijmolt et al. (2010)	“Customers can cocreative value, cocreate competitive strategy, collaborate in the firm’s innovation process, and become endogenous to the firm” (p. 341)	<ul style="list-style-type: none"> <li>• Co-creation (e.g., participation in the firm’s activities, suggestions for service improvements, participation in brand communities)</li> <li>• Customer complaints (e.g., revenge activities)</li> <li>• Word of mouth</li> </ul>	<ul style="list-style-type: none"> <li>• Customer acquisition, expansion, and retention</li> <li>• Product innovation</li> </ul>
Kumar et al. (2010)	“Customers. .. contribute to firms in many ways that are beyond direct transactions.” (p. 297)	<ul style="list-style-type: none"> <li>• Customer influencer behavior (e.g., word of mouth)</li> </ul>	<ul style="list-style-type: none"> <li>• Customer acquisition, expansion, and retention</li> </ul>

**Table 1** (continued)

Sources	Customer engagement	Typologies/examples	Marketing functions
Van Doorn et al. (2010)	“customer behavioral manifestations toward the brand or firm, beyond purchase” (p. 253)	<ul style="list-style-type: none"> <li>• Customer knowledge behavior (e.g., feedback and ideas for innovations and improvements)</li> <li>• Customer referral behavior (e.g., referrals)</li> <li>• Blogging, web posting</li> <li>• Customer-to-customer interaction</li> <li>• Feedback, suggestions for new products ideas</li> <li>• Organizing public actions against a firm</li> <li>• Recommendations, referrals, word of mouth</li> <li>• Writing reviews</li> </ul>	<ul style="list-style-type: none"> <li>• Product innovation</li> <li>• Customer acquisition, expansion, and retention</li> <li>• Marketing communication</li> <li>• Product innovation</li> </ul>
Verhoef et al. (2010)	“a behavioral manifestaion toward the brand or firm that goes beyond transactions” (p. 247)	<ul style="list-style-type: none"> <li>• Blogging</li> <li>• Co creation with new product development activity</li> <li>• Providing customer ratings</li> <li>• Customer-to-customer interactions (i.e., word of mouth)</li> </ul>	<ul style="list-style-type: none"> <li>• Customer acquisition, expansion, and retention</li> <li>• Marketing communication</li> <li>• Product innovation</li> </ul>

If customer engagement is the customer’s voluntary, behavioral *contributions* to the firm, it begs the question: Contributions to what? Insight comes from extant operationalizations of the construct (Kumar 2013; Kumar et al. 2010; Kumar and Pansari 2016). Measures of customer engagement value capture “the profits associated with the purchases generated by a customer’s ... influence on other acquired customers and prospects” (Kumar 2013, p. 36), as well as “the profits generated by a customer’s feedback, suggestion or idea to the firm over a period of time” (Kumar 2013, p. 39). Thus, they quantify behaviors in which customer engagement (e.g., word of mouth, referrals, reviews, feedback) increases “acquisition, retention, and share of wallet” (Kumar et al. 2010, p. 298). Underlying these descriptions and operationalizations is an implicit prioritization of behaviors in which the customer *contributes to the firm’s marketing functions*. For example, word of mouth (e.g., blogging, webposting) contributes to marketing communication effort, as well as to customer acquisition, expansion, and retention through customer-to-customer communication. Customer feedback contributes to product innovation (Cui and Wu 2016). On this basis, customer engagement becomes relevant to the firm.

We therefore define *customer engagement* as a customer’s voluntary resource contribution to a firm’s marketing function, going beyond financial patronage. When customer engagement occurs organically, or naturally in response to product experiences or marketing communications with no deliberate actions from the firm to motivate or empower the customer, it engenders more trust and is more memorable than firm-sponsored communication (de Matos and Rossi 2008). It is twice as effective as radio advertising, seven times more

effective than print advertising, and four times more effective than personal selling (Katz and Lazarsfeld 1995); thus, it affords many benefits to the firm.

### Customer-owned resources in customer engagement

Essential to the proposed definition of customer engagement is the idea that customers have something desirable, other than their financial patronage, that they can contribute to the firm’s marketing functions (Hollebeek et al. 2016; Jaakkola and Alexander 2014). On the basis of our analysis of extant research, we propose that customers possess some combination of four separate, yet interrelated, valuable resources (i.e., customer-owned resources) that otherwise would be unattainable to the firm: *network assets*, *persuasion capital*, *knowledge stores*, and *creativity* (Table 2). These customer-owned resources are “tangible and intangible assets [that] firms [can] use to conceive of and implement its strategies” (Barney and Arian 2001, p. 138) and can be drawn on to accomplish the firm’s goals (Kozlenkova et al. 2014). The resources make customer engagement relevant to firms; they underlie the very existence of engagement marketing.

First, *customer network assets* refer to the number, diversity, and structure of a customer’s interpersonal ties within his or her social network. Customers participate in social networks that connect them to other existing and potential customers. Access to these networks can increase a firm’s reach beyond what is available through its own resources (e.g., purchased leads, current customers) and provide access to broad and diverse audiences that otherwise would not be easily reached by the firm (Brown and Reingen 1987), so leveraging these assets can provide a source of competitive advantage to firms.

Second, *customer persuasion capital* captures the degree of trust, goodwill, and influence a customer has with other

**Table 2** Typology of customer-owned resources

Types of customer-owned resources	Descriptions	Value to firm
Customer network assets	The number, diversity, and structure of a customer's interpersonal ties within his or her social network	<ul style="list-style-type: none"> <li>• Increases reach of engagement marketing initiative</li> <li>• Provides access to particularly influential individuals or unique subgroups</li> </ul>
Customer persuasion capital	The degree of trust, goodwill, and influence a customer has with other existing or potential customers	<ul style="list-style-type: none"> <li>• Increases the influence of the content shared over other customers' purchase decisions</li> </ul>
Customer knowledge stores	A customer's accumulation of knowledge about the product, brand, firm, and other customers	<ul style="list-style-type: none"> <li>• Improves the quality and relevance of the content shared through customer engagement behaviors (e.g., blogging, writing reviews)</li> <li>• Aids in the development, management and dissemination of the brand narrative</li> <li>• Improves customer-to-customer support and customer contributions to new product development</li> </ul>
Customer creativity	"Production, conceptualization, or development of novel, useful ideas, processes, or solutions to problems" (Kozinets et al. 2008, p. 341)	<ul style="list-style-type: none"> <li>• Provides unique insights into marketing functions (e.g., new product development, product usages)</li> </ul>

existing or potential customers. Extant research suggests that information from a customer who is similar or familiar engenders greater trust, appears more authentic, and seems more diagnostic to the receiving customer's purchase decision than the same information received from marketing communication or salespeople (Arndt 1967; Brown and Reingen 1987; Trusov et al. 2009). Importantly, a person can be part of a very large social network (high network assets) but exert very little influence over or even be distrusted within that network (low persuasion capital). Conversely, someone with high persuasion capital who also has a large social network (e.g., opinion leaders, market maven) is a particularly appealing customer, from a customer-owned resource perspective (Feick and Price 1987; Ryu and Feick 2007). Thus, network assets can work synergistically with persuasion capital, but they are conceptually distinct.

Third, *customer knowledge stores* represent a customer's accumulation of knowledge about the product, brand, firm, and other customers. Customers' firsthand experiences with the product and deep knowledge of their own needs often make them optimal sources of usage and product knowledge. Their knowledge thus can enhance the development of marketing communication (Feick and Price 1987), improve customer-to-customer support, and enrich new product development contributions (Nambisan 2002). Again, knowledge stores can work synergistically with other resources, but a person who is highly familiar with the product and its uses (high knowledge stores) does not necessarily have high persuasion capital (e.g., the customer may be introverted, unconvincing in his or her arguments, or unwilling to share personal insights).

Fourth, *customer creativity* is a customer's "production, conceptualization, or development of novel, useful ideas, processes, or solutions to problems," which can be a source of

competitive advantage in areas such as creative marketing communication and product innovation (Kozinets et al. 2008, p. 341). Creative customer-generated content also can motivate idea generation and provide unique insights into meaningful product innovations, which help ensure new product success (Sethi et al. 2001). In summary, customers own four types of resources valuable to firms that are conceptually distinct, but exhibit many synergies.

### What is customer engagement marketing?

Any definition of engagement marketing should accommodate the diverse forms of customer engagement. Many researchers have described engagement marketing as "old wine in a new bottle" or nothing more than "extended relationship marketing" (Brodie et al. 2011, p. 254). Thus, it requires some distinction from other marketing strategies. We propose that *customer engagement marketing* is a firm's deliberate effort to motivate, empower, and measure a customer's voluntary contribution to the firm's marketing functions beyond the core, economic transaction. Although customer engagement can occur organically, engagement marketing means that the firm attempts to guide this role for the customer in ways that are beneficial to the firm, such that it is deliberately initiated and actively managed (Schmitt et al. 2011). Extant research typically studies each type of engagement marketing independently, but integrating these findings reveals that engagement marketing has five distinct characteristics that distinguish it from traditional strategies such as promotion or relationship marketing, as summarized in Table 3.

First, the primary objective of engagement marketing is to encourage customers' active participation in and contribution to the firm's marketing functions. Word-of-mouth marketing, for example, motivates customers to participate in the

**Table 3** Five key differences between engagement marketing and other marketing strategies

Engagement marketing	Promotion marketing	Relationship marketing
A firm's deliberate effort to motivate, empower, and measure a customer's voluntary contribution to the firm's marketing functions beyond the core, economic transaction (i.e., customer engagement)	The use of a special offer to raise a customer's interest and influence the purchase of the focal product versus competitors' products (Wierenga and Soethoudt 2010)	"All marketing activities directed towards establishing, developing, and maintaining successful relational exchanges" (Morgan and Hunt 1994, p. 22)
1. Objective of the marketing initiative		
Encourage a customer's active participation in and contribution to the firm's marketing functions	Induce a single transaction with the focal firm versus a competitive firm	Retain the focal customer and motivate future, repeat transaction with the customer
2. Assessment of customer value		
Customer-owned resources and potential future contributions to the firm's marketing functions	Purchasing power and customer share of wallet	Customer lifetime value from past customer transactions
3. Flow of information		
Networked communication among the customer, other customers, and the firm	One-way communication from the firm to the customer	Bilateral communication between the customer and the firm
4. Firm-directed customer learning		
Training a customer how to contribute to the firm's marketing functions	Teaching the customer how to buy and use the focal product	Understanding the idiosyncratic norms of the exchange relationship
5. Customer control over value creation		
Customer exercises high control, which can affect outcomes relevant to the broader customer population	Customer has no control over value creation and is a receiver of marketing	Customer control is negotiated with the firm, which affects outcomes relevant to the focal customer-firm relationship

acquisition of new customers and the dispersion of marketing communication by leveraging customer network assets (Kozinets et al. 2010). Crowdsourcing, which taps into customer creativity, facilitates customer contributions to product innovation (Howe 2006). Social customer relationship management leverages customer knowledge in their contribution to post-purchase support and customer retention (Malthouse et al. 2013). Unlike engagement marketing strategies, promotion marketing typically refers to the firm's use of a special offer to raise a customer's interest in and influence the purchase of the focal product over competitors' products (Wierenga and Soethoudt 2010), with the objective of inducing a single transaction with the focal firm. Relationship marketing entails "all marketing activities directed towards establishing, developing, and maintaining successful relational exchanges" (Morgan and Hunt 1994, p. 22), so its primary objective is to retain the focal customer and motivate future, repeat transactions. For example, loyalty programs leverage the rewards earned through past customer transactions to motivate future transactions (Palmatier et al. 2006; Verhoef 2003). Engagement marketing marks a shift in focus from both these forms of traditional marketing, in which economic transactions with the focal customer are key, to address customer contributions beyond the economic transaction.

Second, the effectiveness of engagement marketing depends on the firm's ability to identify and leverage customer-owned resources (Hollebeek et al. 2016). Assessments of customer value from this perspective pertain to the value of customer-owned resources and potential future contributions to the firm's marketing functions (Kumar et al. 2010). For example, Anheuser-Busch identified customers with "influence power" and "large social networks [who] were predisposed to share" for its "Up For Whatever" engagement initiative (Event Marketer 2015, p. 2). In contrast, in promotion marketing efforts, the assessments of customer value are based on customers' purchasing power and share of wallet (DelVecchio et al. 2006; Wierenga and Soethoudt 2010); for relationship marketing, customer lifetime value is the central metric, such that past customer transactions help predict the net profit of the future economic relationship with that customer (Venkatesan and Kumar 2004). In recognizing customer value beyond financial patronage, engagement marketing provides a more holistic view of the customer than either promotion or relationship marketing (Chung et al. 2016).

Third, information flows differ in engagement marketing compared with promotion or relationship marketing. In engagement marketing, information flows through networked communication among the customer, other customers, and the firm (Kumar et al. 2016), such that groups and communities hold prominent positions (Kozinets et al. 2010). In

promotion marketing, the information flow instead involves one-way communication from the firm to the customer. Strategic decisions revolve around the channel, source, and content of communication (Duncan and Moriarty 1998). In relationship marketing, information flow is conceptualized as bilateral, between the customer and the firm, and prior research focuses on information asymmetries and the breadth of communication shared between these dyadic parties (Palmatier et al. 2006). Engagement marketing instead takes a more networked view on information exchange.

Fourth, engagement marketing marks a shift in firm-directed customer learning, because the firm must train customers how to enact their new roles as pseudo-marketers (e.g., how to contribute resources). In promotion marketing, customer education involves teaching customers how to buy and use the product; relationship marketing educates customers about the idiosyncratic norms of the exchange relationship, in an effort to improve future exchanges. Thus, the focus shifts from how to buy or use the product, now and in the future, to educating customers about how they can contribute to the firm's marketing functions.

Fifth, engagement marketing requires relinquishing control and shifting value creation in certain marketing functions, from the firm to the customer. In engagement marketing, the customer influences the content and outcomes of many marketing functions that potentially influence the broader customer population (Hollebeek et al. 2016). This format varies dramatically from promotion marketing, in which customers are recipients of, rather than contributors to, marketing. It also is distinct from relationship marketing, in which value gets negotiated between the customer and firm over time, and the customer's influence is limited to their relationship, not extended to the broader customer population.

In summary, engagement marketing is distinct in its objectives, assessment of customer value, information flows, customer education focus, and level of customer control. Just as promotion marketing can influence relationship marketing though (e.g., offering special discounts might increase a customer's loyalty), engagement marketing might influence and be influenced by both promotion and relationship marketing. For example, relationship marketing may facilitate customer engagement through enhanced customer trust and commitment (de Matos and Rossi 2008), and engagement marketing may lead to more purchases or enhance customer–brand relationships by increasing customers' trust, commitment, and satisfaction (Bowden 2009; Kumar and Pansari 2016; Ramani and Kumar 2008; Van Doorn et al. 2010).

### Typology of customer engagement marketing initiatives

Engagement marketing consists of three core elements: motivating, empowering, and measuring customer contributions to marketing. However, the ways firms enact these

three aspects can vary. We identify two primary forms of engagement marketing initiatives, task-based and experiential. *Task-based engagement initiatives* are a firm's initiatives outside the core, economic transaction in which structured tasks guide, voluntary customer contributions to marketing functions (e.g., write a review, refer a customer, provide support to other customers). *Experiential engagement initiatives* are a firm's initiatives outside the core, economic transaction in which shared, interactive experiences promote voluntary, autonomous customer contributions to marketing functions (see Table 4).

**Task-based customer engagement marketing** As the marketing environment evolves and the benefits of customer contributions to marketing functions become more evident, more firms pursue strategies that actively and intentionally stimulate customer engagement (Kozinets et al. 2010). Early engagement marketing efforts were mostly task-based. Extant research tends to investigate one specific task-based engagement marketing initiative at a time, such as word-of-mouth marketing (Kozinets et al. 2010), crowdsourcing (Howe 2006), or social customer relationship management (Malthouse et al. 2013). A review reveals though that all task-based engagement initiatives involve some element of work. That is, customers use their resources to complete some structured task (e.g., refer a customer) that involves mental or physical effort, usually accompanied by some form of reward (e.g., discounts, points, badges). Examples include “leisure firms proactively ask[ing] recent customers to provide ratings on independent comparison websites ... Lays' chips ask[ing] customers to develop a new chips flavor in a contest” (Verhoef et al. 2010, p. 248). Whirlpool asked customers to share how they used their Whirlpool products (e.g., knowledge stores), which generated 44,000 pieces of authentic content and 63,000 social media interactions, as well as product innovation contributions (Crowd Tap Editor 2015). Because task-based engagement initiatives mostly motivate customers extrinsically, extant research tends to focus on identifying their types and calibrating and determining the influence of “payer-engagement” incentives (Ryu and Feick 2007; Verlegh et al. 2013).

Customer participation in task-based engagement initiatives can increase revenue and lower costs (e.g., acquisition, customer support, product launch costs; Fuchs and Schreier 2011; Schmitt et al. 2011). However, engagement initiatives that extrinsically motivate customers with economic incentives tend to be short lived, not cost effective, unsustainable, and prone to opportunism, which can make the firm vulnerable to customer abuse (Verlegh et al. 2013). Extrinsic rewards also tend to undermine relationships (Liu et al. 2015), produce temporary compliance, discourage risk-taking and creativity, and fail to induce lasting change, because they do not create an enduring commitment to any value or action (Pink 2011).



**Table 4** Relevant research on customer engagement marketing

## Panel A: Relevant research on task-based engagement initiatives

Authors	Description of Engagement Tasks	Research Designs	Findings/Propositions
Arndt (1967)	Incentivizing words of mouth	Field experiment	Encouraging word of mouth with task-based initiatives helps with new product acceptance when the resulting comments are favorable but hinders acceptance when the resulting comments are unfavorable.
Brown and Reingen (1987)	Stimulating organic customer engagement	Structured interviews	Customers' social networks are key for generating word-of-mouth behavior in task-based initiatives. Within customers' social networks, weak ties are more important for obtaining a larger reach and accessing other subgroups, whereas strong ties are more important for activating the flow of referral information and influencing others' decision making.
Ryu and Feick (2007)	Incentivizing customer referrals	Experimental studies	Rewards increase the effectiveness of task-based initiatives. When the brand of the tie is weak, rewarding only the participating customer is most effective, whereas when the brand or tie is strong, rewarding both the participating customer and the referred customer is most effective.
Godes and Mayzlin (2009)	Requesting and incentivizing word of mouth	Field test and experimental study	Task-based initiatives that target non-customers outperform those initiatives that target loyal customers, because those within loyal customer's social network are more likely to already have been informed about the firm and its products. This effect is even stronger for products with low or moderate initial levels of awareness.
Trusov et al. (2009)	Incentivizing customer referrals with non-monetary reward	Secondary data analysis with firm-provided data	Task-based initiatives that encourage participants to contribute to customer acquisition efforts by emphasizing network building have longer carryover effects on the future value of the acquired customers and are received more positively by the acquired customer than traditional marketing efforts.
Fuchs et al. (2010)	Requesting participation in the new product development selection process	Experimental studies	Firms that use task-based initiatives, which shift at least some of the power from the firm to the customer for new product development processes, generate stronger demand for the new products than those firms that maintain complete control, because customers develop stronger feelings of psychological ownership toward the new products. This effect diminishes when the new product does not reflect customers' contributions or when customers do not believe in their ability to make sound decisions specific to new product development.
Kozinets et al. (2010)	Seeding a product, related accessories, and information among influential bloggers	Naturalistic, qualitative study	Targeting customers with high persuasion capital and network assets with incentivized (free product and information) task-based initiatives comes with the potential risk of eroding the authenticity of the generated content. Participating customers manage these effects by only sharing content that is personal, in line with their voice, and communally appropriate.
Kumar et al. (2010)	Incentivizing customer referrals with a monetary reward	Field experiment	Task-based initiatives that target customers with low referral value (calculated from the customer's actual past referral behavior) have a greater possible impact on performance, because those customers have potentially underutilized resources (e.g., persuasion capital, network assets). Customer with high referral value may have already exhausted their resources and thus will have less to offer the firm as result.
Fuchs and Schreier (2011)	Requesting participation in the new product development process	Experimental studies	Firms that use task-based initiatives to engage customers in the creation and/or selection of new product designs for production (vs. firms that do not) generate higher levels of perceived customer orientation, corporate attitudes, purchases, loyalty, positive word of mouth, and corporate commitment.
Schmitt et al. (2011)	Incentivizing customer referrals with a monetary reward	Longitudinal study	Customers acquired through task-based initiatives have a higher contribution margin and retention rate and also are more valuable than customers acquired through traditional marketing; however, the higher contribution rates erodes

**Table 4** (continued)

Verlegh et al. (2013)	Requesting and incentivizing customer referrals	Experimental studies and survey	over time. The value of a referred customer also varies across segments, so a firm must carefully identify and target customers for more effective initiative. Monetary incentives (versus non-monetary incentives) for task-based initiatives can have ill effects, including lowered brand evaluations and purchase intentions, because people infer ulterior motives. To overcome these effects, firms can reward both the participating customer and the referred customer (instead of only the participating customer) and/or use symbolic (instead of monetary) rewards.
Panel B: Relevant research on experiential engagement initiatives			
Arnould and Price (1993)	Commercial river rafting trips	Ethnographic field study with survey	Experiential events can lead to interrelated and dynamic aspects of self-transformation such as personal growth, self-renewal, integration into the community, and harmony with nature. Experiential events are more transformational when they are usual, emotionally intense, interactive, and interpersonal-traits that largely depend on the firm's employees to create and deliver.
Price et al. (1995)	Commercial river rafting trips	Ethnographic field study with survey	Delivering experiential events requires extended, effectively charged, and intimate interactions between customers and employees. Thus, employees' ability to manage customers' emotions and goals beyond functional performance (e.g., fun, community, personal challenge) during the event is key.
Belk and Costa (1998)	Fantasy Mountain Man community	Ethnographic study	When an experiential event is highly communal, it is more likely to facilitate self-transformation. Encouraging participants to construct a shared social space and assume fantasy roles will make an event more communal.
McAlexander and Schouten (1998)	Harley Davidson and Jeep branded events	Ethnographic field study	Experiential events generate shifts in consumer attitudes, including loyalty toward the brand, and generate customer engagement (word of mouth) when firms deliver experiences that are unique, communal, and relevant to the participating customer's identity.
Kozinets (2002)	Burning Man project (i.e., one-week-long antimarket event)	Ethnographic study	Experiential events seemingly free of market influence lead to more dramatic self-transformations; when these events become too commercialized or the focal brand or product is too involved, the transformative effect may be eroded.
McAlexander et al. (2002)	Jeep Jamboree, Camp Jeep, and Jeep 101 branded events	Ethnographic field study with survey	Experiential events that encourage participants to communicate and share their experiences with one another will enhance the relationships among the customer, brand, firm, product, and other customers.
Schouten et al. (2007)	Camp Jeep branded event	Pretest/post-test quasi-experimental field study	Experiential events generate long-term shifts in beliefs and attitudes, facilitate self-transformation, strengthen ties to a brand community, enhance brand loyalty.
Brodie et al. (2011)	Online firm-sponsored brand community for the fitness company Vibra-Train Ltd	Netrographic study	People's level of engagement with a brand varies over time. Experiential events that are co-creative and interactive lead to higher degrees of loyalty, satisfaction, empowerment, connection, emotional bonding, trust, and commitment.
Tumbat and Belk (2011)	Commercialized climbing expeditions	Ethnographic study	An individual experiential event (rather than a communal experiential event) can still lead to self-transformation as long as the event involves goal-directed interactions.

Thus, task-based engagement initiatives promote a single instance of firm-defined customer engagement, which may be less effective for inducing long-term customer engagement.

**Experiential customer engagement marketing** Experiential engagement initiatives address some of the shortcomings of

task-based engagement initiatives. A key distinction is that they resemble play more than work and they tend to generate heightened positive emotions and enjoyment. Thus, experiential initiatives are often desirable and valuable for their own sake. Whereas task-based initiatives often focus on extrinsically motivating a specific instance of customer engagement,

experiential initiatives center on intrinsically motivating customer contributions by using experiential events to stimulate heightened psychological and emotional connections to the firm, brand, or other customers. Accordingly, experiential engagement initiatives often generate longer-lasting memories and shifts in beliefs and attitudes than task-based initiatives, fostering emotional attachment to the firm and supporting more long-term customer engagement (Schouten et al. 2007). The experiential event itself becomes central to customer engagement, enriching not just the resulting customer-generated content (e.g., photos, videos) but also any content that the firm directly extracts from the event for marketing communications. For example, Anheuser-Busch's Up for Whatever experiential engagement initiative used each event as a "content factory," transforming attendees into talent for the campaign, with radio frequency identification bands that triggered immediate sharing of photos and videos to social media and a firm-sponsored Whatever USA online photo gallery. Thus, task-based initiatives encourage customers to complete a single firm-defined task, but experiential initiatives use events to motivate autonomous customer contributions.

Although relatively little research investigates experiential engagement initiatives, prior research examining extraordinary consumption experiences, albeit in the context of a core offering, provides some valuable insights into the characteristics of experiential initiatives that can facilitate customer contributions to the firm. Experiential engagement initiatives, by definition, are communal (bring people together in physical or virtual space), which can make people feel as if they are part of something larger than themselves and create a sense of purpose and desire to contribute (Pink 2011; Schouten et al. 2007). Experiential engagement initiatives often are spontaneous and beyond a customer's expectations of an economic firm relationship, so they can prompt gratitude, along with a strong desire to reciprocate (Harmeling et al. 2015). When they are interactive and multisensory, these experiences also can encourage self-transformation and facilitate the incorporation of the brand into the self-concept (Schouten et al. 2007). Once a part of the self, behaviors that support the brand also become self-supportive, such that people likely pursue them more intensely (Markus and Kunda 1986). In summary, task-based initiatives motivate participating customers to complete a single firm-defined task; experiential initiatives use events to motivate autonomous customer contributions.

### Conceptual model of customer engagement marketing

As a final step to develop a theory of customer engagement marketing, we articulate a nomological network of engagement marketing and identify two critical pathways through which engagement marketing affects long-term customer

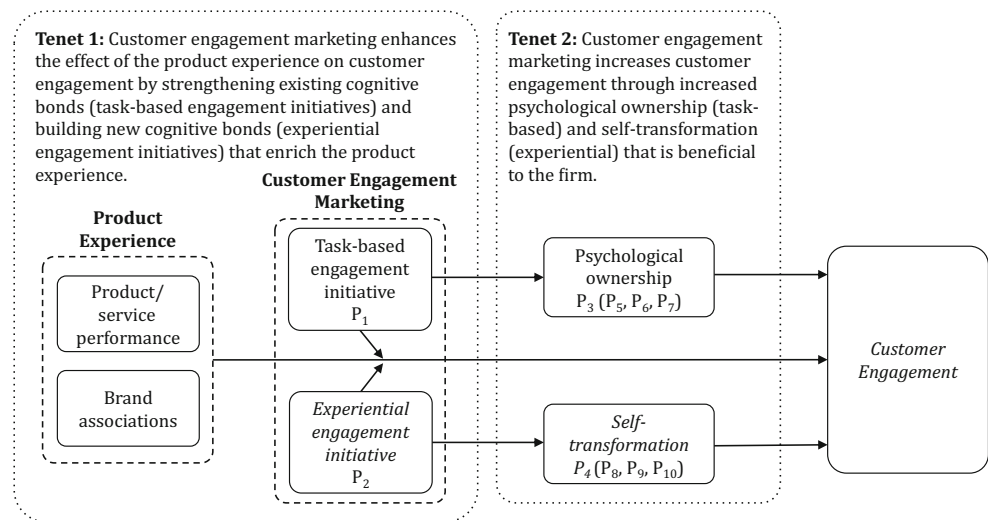
engagement. What should be central to understanding engagement marketing is whatever distinguishes sustainable, beneficial customer engagement from that which is unsustainable and ineffective, or even detrimental—that is, whatever produces successful engagement marketing. It must be that which prompts customers to continue to engage with the firm, beyond participation in the initial engagement initiative.

We propose that engagement marketing may invoke long-term customer engagement by altering the experience of the core offering and its direct effect on the customer. When firms do not deliberately work to stimulate and guide customer engagement, it still can ensue, primarily in response to product experiences (Hennig-Thurau et al. 2003). We propose that engagement marketing strengthens and enriches the customer's mental representation of the core offering, which improves the product experience. It also has implications for how the customer views him- or herself in relation to the firm, thus underlying the transition from customer to pseudo-marketer. It can spark feelings of psychological ownership of the firm, brand, or product. Psychological ownership is "the possessive feeling that some object is 'MINE'," and research suggests that its influence is distinct from that of constructs more typically studied in marketing such as commitment and satisfaction (Van Dyne and Pierce 2004, p. 440). It can facilitate self-transformation, or a change in a person's mental self-image (Maslow 1964). Psychological ownership and self-transformation are thus instrumental to engagement marketing, because they motivate customers to (1) pursue behaviors beyond the economic transaction that benefit the firm, (2) use their own customer-owned resources to preserve and enhance the firm, and (3) view firm requests as more relevant than competitor requests. Thus, engagement marketing enhances the product experience and facilitates the transformation of the customer into an active contributor to the firm's marketing functions (Fig. 2). With two overarching tenets and a series of corresponding propositions, we parsimoniously describe the effects of engagement marketing on firm performance. The tenets are based on extant theory, empirical evidence, and business practice, and we illustrate them with a series of case examples (Table 5).

### Effect of customer engagement marketing on the product experience

Engagement marketing can alter the experience of the core offering and affect long-term customer engagement. Cognitive psychology research on knowledge structures suggests that perceptions of the core offering are stored in customers' minds as an associative network, consisting of cognitive bonds, which refer to the nodes (i.e., concepts) and links between nodes (i.e., relationships between concepts) (Anderson 1983; cf. cognitive units). Experiences of the core offering include product performance memories, such as quality

**Fig. 2** Conceptual model of the effects of customer engagement marketing on customer engagement



assessments, and brand associations, such as brand reputation and personality. Customer engagement initiatives might both influence existing cognitive bonds and build new cognitive bonds, by affecting the strength, content, and organization of knowledge structures. This effect then influences the recall of product information, recognition of additional relevant information, and product imagery, ultimately enhancing the relationship between the product experience and customer engagement (Burke and Srull 1988; MacInnis and Price 1987).

Engagement initiatives by definition occur prior to or between transactions, providing a vehicle through which marketers can influence customers beyond the product experience. They require active participation, which has a greater impact on memory and learning than does hearing or seeing alone, as in traditional marketing (Zimmerman and Schunk 2001). Task-based engagement initiatives typically build on the core offering, requiring some degree of mental effort to complete the task. Although the initiatives can vary in function, some consistency in form typically exists, such that the same task gets repeated over time (e.g., post a comment, like a photo). For example, Dove’s “Speak Beautiful” task-based initiative repeatedly asked customers to tweet new positive body image thoughts (e.g., share advice for building confidence), which resulted in 168,000 pieces of participant-generated content (Shorty Awards 2016). Behavioral repetition strengthens cognitive bonds, which increases the accessibility of that aspect of memory and improves recall (Burke and Srull 1988). Task-based initiatives also require customers to apply brand or product information in a new context, further increasing the memory-strengthening capabilities. As these applied behaviors increase in diversity, the initiative can create competitive interferences favorable to the firm, such that focal product information is recalled more easily than competitors’ (Burke and Srull 1988).

Experiential engagement initiatives also have implications for customers’ mental representations of the core

offering, such as strengthening preexisting cognitive bonds, similar to task-based initiatives. However, experiential initiatives have greater potential to create new cognitive bonds than do task-based initiatives. Experiential initiatives typically incorporate sensory information such as taste, touch, sounds, and smells, as well as emotional and social information that subsequently links to the mental representation of the brand or core offering (Arnould and Price 1993). Each of these information types helps create more vivid images that are then associated with the product. For example, Anheuser-Busch held spontaneous events as part of its Up for Whatever experiential engagement initiative, including flying participants to a fake town (Whatever USA) for a series of extravagant, multisensory events (e.g., ice cream socials with Vanilla Ice). Thus, experiential engagement initiatives enhance existing and create new cognitive bonds, linking the core offering to a more diverse nodes that include multisensory, emotional, and social information, which enriches the customer’s mental representation of the core offering (MacInnis and Price 1987).

When a customer experiences the core offering, it works as a retrieval cue, activating product nodes in memory and triggering associated information based on links to those activated nodes (Anderson 1983). Strong cognitive bonds create a sense of familiarity with the focal product relative to other products, which enhances the customer’s product experience and likelihood that the experience will motivate customer engagement (e.g., word of mouth). Furthermore, new associations change the perception of the core offering to include unique roles, social connections, emotions, and multisensory information, making memories of their participation in the initiative more accessible and easier to recall (MacInnis and Price 1987). For example, Land Rover deploys an experiential initiative that includes a series of events for both current and potential customers, such as tailgating parties and off-road test drives of

**Table 5** Business examples illustrating customer engagement marketing initiatives

Company & sources	Relevant tenets (Propositions) & customer-owned resources	Descriptions of and motivations for customer engagement marketing initiatives	Effect of customer engagement marketing initiatives
<b>Task-Based Engagement Marketing Initiatives</b>			
Dove, Johnson (2016); Saw Horse Media (2016)	Tenet 1 (P1): Customer network assets, knowledge stories, and creativity	In early 2015, Dove launched the “Speak Beautiful” task-based engagement initiative on Twitter that targeted “digitally savvy and socially conscious” people, to contribute to Dove’s marketing communications in its “Speak Beautiful” campaign. Dove tweeted a series of tasks that tapped into customer empathy and creativity by having existing and potential customers tweet positive body image thoughts about themselves and their friends in unique ways (e.g., share advice for building confidence). Dove provided participants with the hashtag #SpeakBeautiful to leverage their existing social networks and expand the initiative’s reach. One year later, Dove extended this initiative with an additional task that enabled participants to share (retweet) certain posts from the brand’s social media page with the hashtag #SpeakBeautifulEffect. As an incentive to contribute, participants were shown “speak beautiful effect” once they shared the posts. Dove provided different analyses of a participant’s previous tweets (e.g., breakdown of positive and negative words used in posts) to encourage repeat participation and also allowed participants to share the results with others in their social network.	Within two days of the launch of Dove’s “Speak Beautiful” task-based engagement initiative, the hashtag #Speak Beautiful was the top trending hashtag. In 2015, people used #Speak Beautiful 168,000 times, driving 800 million social media impressions and reaching an audience of 3 million. There were 5.9 million related tweets overall, of which 411,000 mentioned the Dove name brand. According to Twitter, the “Speak Beautiful” initiative had a long-term effect on brand affinity, increasing brand sentiment by 17%. When Dove expanded this initiative to include an additional task and the hashtag #Speak BeautifulEffect, the brand’s initial tweet was retweeted more than 17,000 times and was liked by nearly 4000 people in the next two months.
Nike and Livestrong; Morrissey (2010); Patel (2009).	Tenet 2 (P3): Customer network assets and creativity	During the 2009 Tour de France, Nike partnered with the Livestrong Foundation to launch the “Chalkbot” task-based engagement initiative, to generate contributions to the brand’s marketing communication. Nike provided the hashtag #livestrong to enable customers to contribute their creative messages of inspiration, hope, and encouragement to the Tour bikers, via text, the Livestrong website, or in reply to the firm-sponsored account on Twitter (@chalkbot). Nike targeted existing and potential customers who typically would be unable to attend the event and gave them a means to participate. As an incentive, selected messages were printed on Tour roads, to amplify the participant’s voice. Nike also provided a website link to a robot-captured photo of the printed message on the roads, along with its GPS coordinates, and allowed participants to share the image with others in their social network.	Nike’s “Chalkbot” task-based engagement initiative led to a more than 4,000 follower gain on Twitter over the course of a month ultimately leading to over 36,000 participant-generated messages of which thousands were printed across 13 stages of the Tour de France. This initiative helped to raise over \$4 million for the Livestrong cause with donations coming from people worldwide. Sales for Nike’s Livestrong apparel line increased by 46%. This initiative also received widespread attention across media outlets and won a number of international advertising awards (e.g., one of the 10 Best Digital Campaigns of the Decade).
Sour Patch Kids; Johnson (2015); Saw Horse Media (2016)	Tenet 2 (P3): Customer network assets, persuasion capital, and creativity	Sour Patch Kids has a history of deploying task-based engagement initiatives that target its core young demographic in an effort to increase brand awareness, contribute to the brand’s customer acquisition efforts, and generate content for marketing communication. One of these initiatives tapped customer creativity by assigning existing and potential customers the task of writing and submitting unique love stories on Wattpad, a social media platform for	The Sour Patch Kids “Sour Then Sweet” task-based engagement initiative attracted roughly 19,000 followers for the brand on Wattpad, an inspiring social media platform for writers, and resulted in a total of 350 participant-generated story entries. Three stories written by popular Wattpad members were read by over 249,000 people and led to 1.2 million social media interactions. People used the hashtag #SPKSAD over 2000 times, which

**Table 5** (continued)

Company & sources	Relevant tenets (Propositions) & customer-owned resources	Descriptions of and motivations for customer engagement marketing initiatives	Effect of customer engagement marketing initiatives
Whirlpool; Neff (2015); Crowd Tap Editor (2015).	Tenet 1 (P1): Customer network assets, knowledge stores, and creativity	<p>up-and-coming writers and the world’s largest community of mobile readers, as part of the brand’s “Sour Then Sweet” love story-writing contest and campaign. The brand targeted members with high persuasion capital by identifying three popular Wattpad members with extensive social networks and inviting them to write and post their own love stories and encourage others to follow their lead. To enable participants to contribute their unique content to the campaign, Sour Patch Kids used the hashtag #SPKSAD. As an incentive, the winning story would be turned into an animated digital film and featured across the brand’s social media accounts and on Wattpad’s homepage.</p> <p>In 2015, Whirlpool launched the “Every Day, Care Project” task-based initiative to connect customers to one another and induce contributions to the brand’s customer acquisition, expansion, and retention efforts. Whirlpool used multiple hashtags including #EveryDayCare, #CareCrowd, and #ItsAllCare to provide an infrastructure for existing customers to contribute to the campaign by sharing the “the ways in which their families care” and how they use Whirlpool products. Whirlpool leveraged customer knowledge stores and creativity to enhance marketing communication by encouraging customers to share their Whirlpool knowledge in creative ways (e.g., authentic images and stories) in social media posts. Customers’ posts served as a means of support to other customers, and also provided unique insights into product innovations by showing how customers were using their Whirlpool products.</p>	<p>generated over 30 million social media impressions. This initiative also earned widespread media coverage across a number of outlets, including Adweek and Media Media Post’s Engage: Teens.</p> <p>Whirlpool’s “Every Day, Care Project” task-based engagement initiative resulted in a 44,000 pieces of authentic participant-generated content, which ultimately led to over 120 million social media impressions. A single participant-generated video alone had over 2 million social media impressions and 63,000 social media interactions. Whirlpool’s Twitter followers increased by 31%, online brand sentiment increased six-fold, and purchase intentions increased by 10%. In addition, in the six months that followed this initiative, sales increased by 6.6%.</p>
<b>Experiential Engagement Marketing Initiatives</b>			
Absolut; Lee (2016); Schultz (2015).	Tenet 1 (P2) and 2 (P4 and 5): Customer network assets, persuasion capital, and creativity	<p>Absolut often implements experiential engagement initiatives that include surprise events designed to provide “out-this-world. .. transformative experiences” to existing and potential customers, to generate and capture autonomous contributions to the brand’s marketing communication. In 2015, as part of the “Absolut Nights” campaign, the brand hosted an “Eletrik House” party in Los Angeles that provided participants with a variety of immersive, communal experiences (e.g. drone bartenders, backyard concert, dance floor). Absolut identified and invited around 400 social influencers with creative backgrounds (e.g., photographer, blogger) and high persuasion capital to the event to create and share high quality content. The brand extracted content from the event and enabled autonomous customer contributions with the hashtag #AbsolutNights, an Absolut Eletrik photo filter, and designated comment boxes online. Absolut also provided participants with a firm-sponsored online brand community, which</p>	<p>Absolut’s “Eletrik House” experiential engagement initiative reached its maximum capacity for the venue. The initiative ultimately led to 63,000 social media interactions and 180 million social media impressions. The brand identified and invited 400 people with creative backgrounds (e.g., photographers, bloggers) and high persuasion capital to participate in the event, who ultimately mentioned the event 1200 times in social media posts. This initiative generated 1400 media news stories, and the sales impact was more than 1.5 times the forecasted expectation.</p>

**Table 5** (continued)

Company & sources	Relevant tenets (Propositions) & customer-owned resources	Descriptions of and motivations for customer engagement marketing initiatives	Effect of customer engagement marketing initiatives
Bud Light; Event Marketer (2015); Nudd (2014).	Tenets 1 (P1, 2) and 2 (P4, 5): Customer network assets, persuasion capital, and creativity	<p>served as an additional infrastructure for participant-created content and event and brand-related discussions.</p> <p>Bud Light has a history of implementing experiential engagement initiatives that use events to transform existing and potential customers into talent for the campaign and generate content that can be directly extracted by the brand. The events themselves serve as “content factories” for the brand’s marketing communication. As part of its “Up For Whatever” campaign, Bud Light held over 22,000 surprise, communal events across the United States and held on site auditions for the chance to win a visit to Whatever, USA, a fake town created entirely by the brand. The event auditions were captured and uploaded onto the firm-sponsored YouTube channel. Selected participants wore radio frequency identification bands at the event that triggered immediate sharing of photos and videos to social media feeds and an online firm-sponsored Whatever, USA, photo gallery. Bud Light provided participants with the hashtag #UpForWhatever and a Bud Light photo filter to encourage them to share their personal experiences with others in their existing social networks. In addition, Bud Light identified selected participants who had a large social networks and who were predisposed to share content to receive surprise experiences that were then captured and uploaded onto the brands You Tube channel.</p>	<p>Bud Light’s “Up For Whatever” experiential engagement initiative resulted in more than 1.8 million participants, of which 1.4 million participated in over 22,000 hosted on-site events. More than 100,000 people auditioned to visit the fake, brand-created Whatever, USA, town. The brand ultimately selected 1000 people to visit, and they alone created 37,000 initiative-related media posts. More than 15 million people directly assesses content associated with the hashtag #UpForWhatever, leading to over 2.5 million social media interactions and 587 social media impressions, which exceeded forecasted expectations by 267%. This initiative reached 40% more millennials than the campaign’s Super Bowl television advertising. Website traffic for <a href="http://Upforwhatever.com">Upforwhatever.com</a> was also over 212% higher than it was during the Super Bowl. In terms of the direct impact on sales, by the time the initiative ended, a five-year on-premise sales decline was cut in half, the four-week usage among millennials jumped 39%, and brand preference indicators increased by 30%.</p>
Nikon; Friedman (2013); Saw Horse Media (2016).	Tenets 1 (P2) and 2 (P3, 4, 5): Customer network assets, persuasion capital, and knowledge stores	<p>At the 2013 South by Southwest Interactive, Film and Music Conference and Festival (SXSW), Nikon launched the “The Warner Sound Captured by Nikon” experiential engagement initiative to generate customer contributions to the brand’s marketing communication that increased brand awareness and excitement for key products. Nikon gave participants cameras to capture live performances and enabled them to share their live-streamed captured content automatically by providing the hashtag #NikonWarnerSound. Nikon also set up on-site booths where participants could use Wi-Fi-enabled cameras to share any captured images instantly to their existing social networks. To extend the initiative’s reach and access unique subgroups, Nikon invited select artists to participate in the initiative by providing the artists with Nikon cameras and the hashtag #NikonWarnerSound to capture and share their own personal experiences leading up to their shows.</p>	<p>The “Warner Sound Captured by Nikon” experiential engagement initiative stimulated a large number of online conversations. The initiative’s hashtag #NikonWarnerSound was a top trending hashtag on all three insights of SXSW and reached the top trending spot on the second night, which led competitors to purchase Twitter placement against the Nikon hashtag. Overall, this initiative created 46 million news media impressions and 166 million social media impressions. People used the hashtag #NikonWarnerSound more than 15,000 times with positive sentiment. Nikon release 60 tweets during the event, which were re-tweeted 200 times. Over 500,000 people watched the participant-generated content from the event that was live streamed online, with an average viewing time (11+ minutes) that was more than five times greater than the industry average (2 min). In addition, participants generated and shared 1100 photos across social media from on-site Nikon booths at the event.</p>
Sprite; Polizzi (2015); SET Creative (2016).	Tenets 1 (P2) and 2 (P4, 5): Customer network assets, persuasion	<p>Sprite tends to implement experiential engagement initiatives that incorporate multi-sensory events to generate and exact content that contributes to the brand’s marketing communication. One of these experiential</p>	<p>Sprite credited its “Sprite Corner” experiential engagement initiative with driving word of mouth, producing participant-generated brand content, and increasing brand affinity. This initiative lead to more than 908 million social</p>

**Table 5** (continued)

Company & sources	Relevant tenets (Propositions) & customer-owned resources	Descriptions of and motivations for customer engagement marketing initiatives	Effect of customer engagement marketing initiatives
	capital, and knowledge stores	engagement initiatives launched in July 2015, when Sprite opening its first “Sprite Corner,” a month-long pop-up venue in New York that targeted creative people who were passionate about hip-hop, film, comedy, art, and good food. At Sprite Corner, the brand held a number of multisensory, communal events (e.g., live concerts, movie screenings, cooking classes), designed to integrate “interesting things and interesting people.” Sprite identified participants with high persuasion capital such as F. Gary Gray, a director and actor with 45.5 million Twitter followers, to share their participation in the event with others. In addition, Sprite used its social media accounts to post content that showcased the “novelty, surprise, and originality” of the events using the hashtags #SpriteCorner and #ObeyYourThirst. Sprite encouraged autonomous customer contributions by providing hashtags and enabling people to retweet and share any initiative-related content. Thus, participation in the events became the content for Sprite’s traditional marketing	media impressions with 120 million views for participant-generated video that content that featured Sprite Corner. All events held at Sprite Corner reached the maximum capacity for the venue. In addition, since the launch of the initiative, there has been a 50% increase in mentions of the Sprite brand name in music-related conversations.

Impressions are the number of times the content is displayed. Interactions are the number of interactions people have with the content (e.g., likes, comments, shares, retweets)

new models. After the event, when a participating customer drives his or her own Landrover, regardless if it is to work or to drop the kids off to school, it activates memories and emotions from their participation in the experiential engagement initiative. Thus, customer engagement initiatives can alter the experience of the core offering by (1) strengthening existing cognitive bonds and also (2) creating new cognitive bonds that otherwise might not be associated with the product experience. Accordingly, we propose:

**Tenet 1:** Customer engagement marketing enhances the effect of the product experience on customer engagement by strengthening existing cognitive bonds (task-based engagement initiatives) and building new cognitive bonds (experiential engagement initiatives) that enrich the product experience.

**Proposition 1:** Task-based engagement initiatives that promote consistent, repeat behavior over time strengthen the impact of the product experience on customer engagement.

**Proposition 2:** Experiential engagement initiatives that are multisensory strengthen the impact of the product experience on customer engagement.

**Effect of customer engagement marketing on customer outcomes**

Engagement marketing also can have effects on customers. Due to the distinct nature of task-based versus experiential engagement initiatives, we propose that their effects on long-term customer engagement occur through two mechanisms: psychological ownership and self-transformation.

**Effect of customer engagement marketing initiatives**

Although task-based initiatives typically are designed to facilitate one instance of customer engagement, successful initiatives perpetuate long-term customer engagement, beyond the completion of the original task. These initiatives are distinct from other marketing strategies, in that participation requires the customer to contribute, voluntarily and actively, to the firm. Sour Patch Kids, for example, has a history of employing task-based initiatives that ask customers to create and contribute authentic content for the brand (e.g., “Sour Then Sweet love story-writing contest”). This effort has unique psychological implications, distinct from the effects of advertising or traditional marketing, such that it facilitates feelings of



ownership of the firm, even when no legal ownership exists (Van Dyne and Pierce 2004).

Once customers feel as though the firm is “theirs,” it has several implications for that customer’s engagement with the firm beyond the initial task-based initiative. People evaluate the firm more favorably when they feel a sense of ownership toward it (Fuchs et al. 2010; Kahneman et al. 1990). Feelings of ownership also motivate people to protect and maintain their ownership rights (Van Dyne and Pierce 2004) and create a sense of responsibility toward the firm that can motivate proactive attempts to improve the firm (Fuchs et al. 2010). Finally, feelings of ownership stimulate discretionary behaviors that contribute to the target of ownership’s well-being (Van Dyne and Pierce 2004).

Alternatively, experiential engagement initiatives aim to stimulate voluntary, autonomous customer contributions by facilitating positive experiential events for customers. Experiential engagement initiatives are unique from other marketing strategies in that they include multisensory, highly participatory, shared experiences that are desirable in and of themselves; yet they are not “purchased” as with consumption experiences. Several aspects of experiential engagement initiatives can spark customer engagement, but across diverse studies, their unique ability to “generate lasting shifts in beliefs and attitudes” and long-term customer engagement stems from their effectiveness in transforming the self (Schouten et al. 2007, p. 357).

Self-transformation is different from psychological ownership in that it entails the question “who am I?” rather than “what is mine?” (Van Dyne and Pierce 2004). It reflects the difference between incorporating distinctive and admired characteristics of the target in the self and feeling possessive over the target, or more succinctly, the difference between “I” and “mine.” Self-transformation requires significant investments of emotional and cognitive resources; once transformed, the self is relatively stable (Markus and Kunda 1986). In contrast, feelings of ownership weaken when control over or investment in the target diminishes. Therefore, self-transformation likely has a longer lasting impact.

Finally, self-transformation represents a substantial shift in how the customer views him- or herself, with significant implications for long-term customer engagement. Moments of self-transformation can spark strong emotional connections (e.g., love) toward entities perceived as being responsible for it (e.g., the firm, other customers) (Dodson 1996; McAlexander et al. 2002). Once the firm is incorporated in the self, actions that support the firm also become self-reinforcing and are pursued more frequently. Therefore, participating customers pursue long-term customer engagement as a means to manage the self. We expect task-based initiatives to operate more through psychological ownership because they resemble work where the customer’s unique contribution to the firm is central. Experiential initiatives will operate more through self-transformation because

they resemble unstructured play (Schouten et al. 2007) where the customer’s emotional and psychological responses to the event are central. We theorize their primary paths, without precluding a potential effect of each on the alternative path.

**Tenet 2:** Customer engagement marketing increases customer engagement through increased psychological ownership (task-based) and self-transformation (experiential) that is beneficial to the firm.

**Proposition 3:** Feelings of psychological ownership mediate the impact of task-based customer engagement marketing initiatives on long-term customer engagement.

**Proposition 4:** Self-transformation mediates the impact of experiential customer engagement marketing initiatives on long-term customer engagement.

### **Task-based customer engagement marketing initiatives**

Because psychological ownership is key to long-term engagement, our theoretical framework also provides a foundation for predicting which aspects of the initiative are key to its success. First, the participatory nature of task-based initiatives can imply some degree of control over the firm. To control something “eventually gives rise to feelings of ownership toward that object” (Pierce et al. 2001, p. 301). In early studies of ownership, control even was equated with ownership (Rudmin and Berry 1987). Task-based initiatives vary in the degree to which customers exercise control though; for example, tasks that allow for greater autonomy (e.g., creative contributions) offer greater control over the task outcome, such that they increase the likelihood that ownership feelings emerge.

**Proposition 5:** Task-based customer engagement marketing initiatives with greater control over the outcome increase psychological ownership and ultimately customer engagement.

Second, task-based initiatives facilitate learning and the development of deep understanding of the firm. The more a customer feels he or she can command knowledge about the firm or product, the stronger his or her feelings of ownership toward the firm (Van Dyne and Pierce 2004). Unlike traditional marketing, which promotes passive learning through seeing or hearing, task-based initiatives promote active learning by training the customer to contribute to the firm’s marketing functions. They are interactive and often require participating customers to extend their knowledge into new domains, beyond usage and consumption. Many forms of task-based engagement marketing, such as providing support for other customers or writing a review, resemble teaching more than learning. Teaching a subject facilitates deeper, more intimate

knowledge (Zimmerman and Schunk 2001), facilitating psychological ownership even further.

**Proposition 6:** Task-based customer engagement marketing initiatives that facilitate deeper learning increase psychological ownership and ultimately customer engagement.

Third, task-based engagement initiatives facilitate self-investment, granting customers a means to “invest their time, ideas, skills, and physical, psychological and intellectual energies” in different aspects of the marketing program (Pierce et al. 2001, p. 302). Because research suggests that “we often feel we own that which we create, shape, or produce,” the degree of self-investment should influence feelings of ownership (Pierce et al. 2001, p. 302). Complex tasks such as creative contributions require the customer to invest more personal ideas, knowledge, and styles than other, less complex task, such as sharing marketing communications.

**Proposition 7:** Task-based customer engagement marketing initiatives that encourage self-investment increase psychological ownership and ultimately customer engagement.

### Experiential customer engagement marketing initiatives

Research on experiential events—such as river rafting trips (Arnould and Price 1993; Price et al. 1995), antimarket events (Kozinets 2002), and climbing expeditions (Tumbat and Belk 2011)—suggest that three characteristics facilitate self-transformation. First, the competitive nature of many experiential engagement initiatives creates conditions for a state of flow, or total absorption in an activity to the point that nothing else matters (Csikszentmihalyi 1975). It results from the intense pursuit of mastery over an activity; is highly emotive; and can stimulate a sense of transcendence over the mundane, as well as a deeply rooted sense of achievement. Thus, interactive events that test the customer’s ability should increase self-transformation.

**Proposition 8:** Experiential customer engagement marketing initiatives that test participants’ abilities increase self-transformation and ultimately customer engagement.

Second, experiential engagement initiatives go beyond expectations about the core economic relationship. For example, Absolut vodka created experiential initiatives designed to provide “out-of-this-world ... transformative experiences” (Lee 2016) featuring drone bartenders and backyard concerts. Unusual events heighten emotional intensity, which can fuel self-evaluative cognitive processes (Harmeling et al. 2015); unexpected events spark vivid memories and contribute to personal narratives to define a person’s identity (Arnould and Price 1993).

**Proposition 9:** Experiential customer engagement marketing initiatives that involve spontaneous events increase self-transformation and ultimately customer engagement.

Third, by nature, experiential engagement initiatives are shared experiences; such communal events often link to self-transformation. Participating in shared events can “increase the emotional intensity of links among persons widely scattered and dissimilar in ordinary life” but who share this experience, thus “creating a temporary sense of closeness” (Arnould and Price 1993, p. 27). Through the resulting contagion effects, emotion may be transferred from one group member to another (Barsade 2002). For example, a Sprite Corner experiential engagement initiative used communal events, such as live concerts, movie screenings, and cooking classes, to integrate “interesting things and interesting people.” Such shared experiential initiatives can create a sense of kinship and heighten emotional responses, sparking transformations of the self.

**Proposition 10:** Experiential engagement initiatives that are communal increase self-transformation and ultimately customer engagement.

### Empirical test of customer engagement marketing

Underlying our theoretical framework of engagement marketing is the notion that the ultimate goal, and the most difficult outcome to achieve, is a transformation of the customer’s perception of the self in relation to the firm: not a mere consumer but a contributor to marketing functions. Along with the anecdotal evidence, empirical evidence of the importance of self-transformation would provide stronger support for the theoretical framework we propose. “A theory which is not in fact refuted by testing those new and bold and improbable predictions to which it gives rise can be said to be corroborated by these severe tests” (Popper 1962, p. 217). Thus, consistent with Popper’s program for theory validation, empirical support for the most severe test of our theoretical framework (i.e., self-transformation) would provide evidence of corroboration of our theoretical framework. Thus, as a first step, we test the mediating role of self-transformation as a key aspect of engagement marketing effectiveness (direct test of Tenet 2).

### Research context and research design

We used a before-and-after, quasi-experimental design to test the effects of experiential engagement initiatives on customer engagement (Cook et al. 1979). Experiential engagement initiatives consist of multisensory, communal events that take

place beyond customers' core transactions with a firm. Accordingly, we collected the data for this study in conjunction with a supermarket that served as the title sponsor of an experiential engagement initiative, namely, a large-scale community running event. The weekend-long event consisted of four races (5 km, 15 km, 10 km, and half-marathon) and attracted nearly 27,000 participants.

All the data were collected electronically. The preregistered event participants received an invitation to join the study four weeks prior to the event, along with a welcome letter from the race director with information about parking, weekend events, things to do, and so on. In pre-event surveys, coded with identification numbers, participants provided responses on baseline measures of engagement with the firm (Brodie et al. 2011; Kumar et al. 2010), self-perceptions (Bandura 1997), and basic demographic information. Approximately 10% ( $n = 2124$ ) of the preregistered participants completed this online survey on time. Four days after the event, we sent another identification-coded, post-event survey via email to all respondents who completed the pre-event questionnaire on time. It featured post-event measures of customer engagement, self-perceptions, and a measure of the experiential engagement initiative. The four-week gap between the repeated measures should decrease respondents' ability to recall the first set of questions and their responses. Approximately 57% ( $n = 1203$ ) of the pretest respondents completed the post-test, which serves as our final sample. Sixty-one percent of respondents were women, and their ages ranged from a low of 18 years to a high of 82 years, with a median age of 40 years.

## Measurement

We use a multi-item, seven-point, Likert-type scale informed by existing scales to capture assessments of the experiential engagement initiative: "I felt like I was having the ideal [activity category] experience," "I truly enjoyed this experience," and "This was an extremely positive experience" (1 = "Strongly disagree," 5 = "Strongly agree"; Dodson 1996; Schouten et al. 2007). Because word of mouth and its many

forms is a primary type of customer engagement, our customer engagement measure captures participants' word-of-mouth behavior toward the focal firm. Self-transformation implies a shift in how a person views him- or herself, including abilities. Therefore, we captured pre- and post-event measures of participants' self-efficacy perceptions, or their belief in their ability to succeed in specific situations, with the following items: "In general, I think that I can obtain outcomes that are important to me," "I believe I can succeed at most any endeavor to which I set my mind," "I will be able to successfully overcome many challenges," and "I am confident that I can perform effectively on many different tasks" (1 = "Strongly disagree," 5 = "Strongly agree"; Bandura 1997). To calculate self-transformation, we subtracted the pretest measures of self-efficacy from the posttest measures. All factor loadings exceeded .60, the Cronbach's alphas exceeded .80, and the average variance extracted (AVE) was greater than or equal to .62. In support of discriminant validity, the square root of each construct's AVE exceeded its correlations with all other constructs (see Table 6). As a robustness check, we tested a model using self-reported self-transformation; the results were consistent with the more conservative pre-/posttest measure we used.

## Results and discussion

Using the bootstrapping procedures described by Hayes (2013), we conducted a mediation analysis with the PROCESS macro (Model 4; 5000 bootstrapped samples) to test the effects of experiential engagement initiatives. Because we used a before-and-after design, we controlled for pretest measures of customer engagement, to capture any change in these variables due to the treatment variable (i.e., experiential engagement initiative) (Allison 1990). Table 7 contains the results of the mediation analysis for the experiential engagement initiative's effect on customer engagement. The significant effect of the initiative on self-transformation in Model 1 ( $\beta = .12, p < .01$ ), which then fosters customer engagement ( $\beta_{\text{self-transformation}} = .21, p < .01$ ) in Model 2, indicating a

**Table 6** Descriptive statistics and correlations

Constructs	M	SD	AVE	1	2	3	4	5
1. Experiential engagement initiative	3.80	.72	.62	<b>.83</b>				
2. Self-transformation	-.09	.60	.63	.12	<b>.87</b>			
3. Customer engagement	4.28	.66	N.A.	.21	.10	<b>N.A.</b>		
4. Customer gender	N.A.	N.A.	N.A.	-.07	.02	.12	<b>N.A.</b>	
5. Customer age	40.92	11.96	N.A.	-.10	-.03	.02	-.18	<b>N.A.</b>

$M$  = mean,  $SD$  = standard deviation,  $AVE$  = average variance extracted. Correlations are reported below the diagonal. Cronbach's alphas are reported in bold on the diagonal. Correlations greater than |.03| are significant at  $p < .05$ . Model fit:  $\chi^2 = 47.80$  (13); comparative fit index = .99; incremental fit index = .99; normed fit index = .99; root mean square residual = .01; root square error of approximation = .04

**Table 7** Effect of experiential engagement initiative on customer engagement

Constructs	Mediator: Self-transformation Model 1	Outcome: Customer engagement $T_2$
Experiential engagement initiative	.12 (.02) **	.10 (.02) **
Self-transformation		.21 (.03) **
Customer gender	0.03 (.04)	.09 (.03) **
Customer engagement- $T_1$	-.16 (.02) **	.50 (.02) **
Constant	.06 (.15)	1.45 (.14) **
Model evaluation		
R <sup>2</sup>	.06	.36
Indirect effect of experiential engagement initiative on customer engagement		.03 (.01) CI: .01, .04

*n* = 1203. Standard errors are listed in parentheses to the right of the parameter estimates. Mediation tested using PROCESS Model 4

\*\**p* < .01

significant indirect effect of experiential engagement on customer engagement (.03, confidence interval: .01, .04), supports the mediating role of self-transformation. This empirical test provides initial evidence that experiential engagement initiatives stimulate customer engagement through self-transformation. Because we used a pretest/posttest design and examined a real experiential engagement initiative, this compelling test of our hypothesis affirms the important role of the self in customer engagement.

### Conclusion and research directions

What value does a theory of customer engagement marketing offer? In our theory of engagement marketing, the lines between employees and customers have blurred, creating a need for new theories that can explain evolving roles, relationships, and outcomes. In turn, a broad research agenda arises from the theoretical foundation we have established in this research.

#### Designing and delivering effective engagement initiatives

If engagement marketing involves the customer as a pseudo-marketer, then the firm must be a pseudo-employer, which must incentivize customer work and productivity to achieve effective engagement initiatives. Substantial research in management (Nohria et al. 2008) and an emerging stream in marketing (Kumar and Pansari 2016) suggest ways to motivate employee contributions; significant work remains to be done to determine if these theories also apply to customers who are not financially or legally tied to the firm. Extant research identifies three types of incentives: economic rewards or monetary incentives that increase engagement but also might limit its effectiveness (Ryu and Feick 2007; Verlegh et al. 2013);

symbolic rewards, which have no material value but are valuable to the person receiving them (e.g., status, milestones) and may help preserve the perceived authenticity of the engagement (Verlegh et al. 2013); and amplified voice, which captures the amplification of the customer’s engagement efforts through the firm’s paid, earned, or owned channels (e.g., company website, traditional advertising).

Task-based initiatives typically follow a traditional pay-per-engagement structure, but experiential engagement initiatives rely on proactive incentives to stimulate customer contributions. The lack of research in this area implies some remarkable opportunities. For example, experiential initiatives resemble play, so research on games might provide insights into effective design elements (Caillois 1961). According to research on flow, if experiences balance challenge and ability, such that the challenge is just beyond the person’s ability, they may be particularly effective (Csikszentmihalyi 1975; Tumbat and Belk 2011). Clear rules, equivalent adversaries, and indisputable results can amplify these effects (Caillois 1961). Thus, research that examines competition rules, artificial competition (e.g., age group awards), milestones, or progress tracking might uniquely inform initiative designs. In addition, the skills needed to deliver effective engagement initiatives may not map to those traditionally studied in domains such as sales and services (Arnould and Price 1993). This gap warrants a systematic investigation of which skills are most relevant.

#### Harnessing customer-owned resources: engagement tools

Successful engagement marketing depends on the firm’s ability to identify and leverage customer-owned resources, so firms must heavily invest in, develop, and use new tools that enable customers to contribute resources to the firm. Because such tools previously were of limited importance to the firm,

there is very little research in this domain. We identify four types of engagement tools from our review of extant engagement marketing research that might be pertinent. First, *amplification tools* diffuse engagement behaviors among participating customers' existing network structures, such as repin, retweet, reblog, and share buttons. Second, *connective tools* link the participating customer to other customers, the firm, or the engagement initiative and include tools such as tagging, following, message boards, forums, and online virtual communities. Third, *feedback tools* enable the customer to react to a particular action by the firm or other customers, as in the form of comment boxes, likes, +1 s, ratings, or polls. Thus customers can express their product knowledge and empathy for other customers. Fourth, *creative tools* facilitate the creation, development, and contribution of unique ideas, using tools such as upload links, design functions (e.g., filters, editing tools), and virtual labs (Nambisan 2002). However, further research is necessary in this domain.

Another fruitful area for research might describe the role and effectiveness of engagement tools that support the design of in-house platforms for customer engagement or leverage existing third-party communication channels (e.g., Facebook, Twitter). For example, Starbucks created [MyStarbuckIdeas.com](http://MyStarbuckIdeas.com), an in-house message board where customers can upload their ideas for product innovations and improvements; it relies on ratings, polls, comment boxes, and shares. Connective tools such as hashtags instead might identify messages related to a specific topic (e.g., marketing campaign) and can be used on third-party communication channels to enable, identify, and track customer participation in engagement marketing initiatives, without requiring direct investments in the development and management of an in-house platform. Thus, in addition to enabling customer engagement, engagement tools may offer the added benefit of providing better measures of customer engagement. They increase visibility of customer behaviors beyond the core transaction and enable matches between these behaviors and customer transaction data. This major shift in the assessment of customer value moves the focus from purely transactional to broader contributions to firm performance (Kumar et al. 2010). Research also should investigate the difference between online and offline tools.

Finally, experiential engagement initiatives can increase customer resources. Communal events put customers in contact with other existing and potential customers, which may expand customer network assets, by strengthening existing and building new ties. It also can increase knowledge sharing about a variety of dimensions, such as product usage, brand knowledge, and customer empathy (McAlexander and Schouten 1998). Participating in an event can act as a milestone in the consumption community, with status implications that increase the participant's persuasion capital (Schau et al. 2009).

## The dark side of customer engagement

Empowering customers is essential to engagement marketing, but it brings about potential risks as well (Van Doorn et al. 2010). The firm must not only relinquish control but also amplify customers' actions, by providing platforms and audiences that increase their reach. The result may be a state of vulnerability for the firm. The accessibility of new tools and platforms also may encourage customers to engage in negative word of mouth or induce detrimental legal or regulatory policies (Van Doorn et al. 2010). For example, customers have turned firm-initiated hastags (e.g., McDonalds' #McDStories) into "bashtags" (Hill 2014). Even mainly positive content has the potential to harm the brand, such as by attracting new customers who do not fit with the brand's image. Researchers should investigate ways to manage this vulnerability, both proactively and reactively.

Engagement marketing aims to improve the customer trajectory, but there may be unintended effects too. It could disrupt existing mechanisms that facilitate repurchase behaviors, such as habit, dependence, or relational loyalty (Henderson et al. 2014). It also may create higher expectations of firm engagement, which might lead to inflated costs or, if not managed appropriately, lower customer satisfaction. Firms that do not respond appropriately, swiftly, and sincerely to customer feedback risk not only losing a customer but also tarnishing their reputations, in that a brand that fosters greater engagement may experience a disproportionately higher level of disappointment if it fails (Roehm and Brady 2007), relative to a comparable brand with lower engagement.

In summary, the marketing environment has radically transformed into one in which the customer can exert influence over more marketing functions than ever before, altering the requirements for competitive success (Kumar and Pansari 2016). These conditions create the need for engagement marketing, or a firm's deliberate efforts to motivate, empower, and measure customer contributions to the firm's marketing functions beyond the core, economic transaction. Although these empirical findings and the case examples provide compelling evidence and encouraging results in support of the proposed model, much work remains to be done, including research into the dynamic aspects of engagement marketing that assesses the potential impact of initiatives on the customer trajectory, how it varies over the customer's lifetime, and the degree to which engagement effects decay over time. Our case examples feature products and firms with a wide variety of attributes; a more systematic investigation of which product types (e.g., generic, luxury) are more conducive to engagement marketing also is warranted. Finally, we highlight many of the marketing functions typically studied from an engagement perspective, but more are possible (e.g., product merchandising). Our conceptual model and empirical test thus should serve as guides for academics who seek to advance research in this area and for practitioners who need to design and implement effective engagement marketing strategies.

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