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Chapter 33

Tracking the Evolution of Engagement Research: Illustration of Midrange Theory in the Service- Dominant Paradigm

Elina Jaakkola, Jodie Conduit and Julia Fehrer

Introduction

When Hunt (1983) predicted the end of the hiatus between the conceptual development of marketing theory and the application of increasingly sophisticated mathematical and statistical procedures in marketing research, he was at least partly right. While much was achieved in advancing empirical methods to understand, explain and predict market phenomena, a divide between the process of theory formulation and verification inevitably opened up. Yadav (2010) distinguished two contexts of theory development: (1) the context of discovery, related to the conception of new ideas (e.g. new concepts), or the creative synthesis of existing ideas (e.g. new relationships between theories and/or concepts) and (2) the context of justification, that is, the realm in which data and analytical procedures are employed to establish the plausibility and acceptability of these ideas. According to Day and Montgomery (1999), the process connecting

these two contexts is one of the most important challenges for the marketing discipline in the twenty-first century. However, little attention has yet been given to the theorizing process in marketing and service research, and how this process can explain and predict the evolution of emerging phenomena in our discipline (MacInnis, 2011; Yadav, 2010).

Service dominant (S-D) logic lies at the forefront of rethinking the nature of markets and societies, recognizing the social construction of networks, relations, institutions and social practices within these markets (Vargo and Lusch, 2016). As such, S-D logic resonates with today's contemporary business networks, recognizing the complex interdependencies, open and interactive network structures, and new government mechanisms for network-centric relationships. S-D logic offers a coherent general structure and paradigmatic lens to view emerging markets and marketing phenomena. A logical next step to advance S-D logic as a metatheory is to bring its narrative closer to the context of justification. Echoing Lusch and Vargo (2014) and Vargo and Lusch (2017), we argue that it is important to reflect on the mechanisms that link S-D logic with evidence-based research and managerial practice, through the interplay of the contexts of discovery and justification.

Midrange theories provide connections between metatheories, such as S-D logic, and empirical research (Brodie et al., 2011b). They address a limited scope of phenomena in specific contexts and feature a lower level of theoretical abstraction compared with metatheories. Midrange theories enable operationalization, and hence are utilized to undertake empirical observation of marketing practices (Brodie and Löbler, 2018). These theories play a central role in bridging the theoretical domain and the empirical domain of knowledge, through synthesizing the context of theory discovery with the context of theory justification. To gain a deeper understanding of the development of S-D logic informed midrange theory, *we illustrate the process of theorizing using the example of the evolution of engagement research.*

In recent years, the concept of engagement has developed into one of the most central concepts of contemporary marketing theory and practice (Pansari and Kumar, 2016) and in the direction of an essential midrange theory for S-D logic (Vargo and Lusch, 2017). The engagement

concept emerged from managerial practice and was quickly acknowledged as a key research priority in the marketing domain (e.g. Bowden, 2009; Brodie et al., 2011a). Engagement is found to have significant managerial and academic bearing on how the expanding roles of customers may contribute to firm–customer relationships (e.g. Kumar and Pansari, 2016), customer brand connections (e.g. Brodie et al., 2013; Hollebeek et al., 2014), firm marketing functions (Harmeling et al., 2016) and ultimately value co-creation (e.g. Jaakkola and Alexander, 2014; Storbacka et al., 2016). In seeking to understand this phenomenon and ground it in a theoretic perspective, scholars have drawn on the narrative of S-D logic.

The purpose of this chapter is to examine how S-D logic as a metatheory can inform, and be informed by, midrange theory development. By tracking the evolution of engagement research we provide a rich example for an iterative theorizing process, which combines systematically the theoretical and empirical domains of knowledge. Our study makes several contributions. First, we provide an assessment of the key development phases of engagement research, and highlight how one stream of engagement research has developed in parallel with the service-dominant paradigm, reflecting its foundational premises and axioms, and utilizing its core lexicon. Our literature review indicates that S-D logic informed engagement research has evolved beyond customer–firm dyads to consider multiple actors in the ecosystem (e.g. Jaakkola and Alexander, 2014). Thus, drawing on S-D logic as a metatheory has allowed the conceptual scope of engagement to evolve by equipping researchers to zoom out in terms of level of aggregation. Further, we illustrate how the midrange theorizing process of engagement has been formulated and substantiated by abstracting from S-D logic metatheory, and shaped and verified by drawing from empirical findings and theories-in-use and thus informed S-D logic in terms of level of abstraction. This analysis responds to recent calls to advance midrange theory development aligned with the S-D logic narrative (Vargo and Lusch, 2017).

The chapter is organized as follows. In the next section we discuss S-D logic as a metatheoretical lens for midrange theories. Then we outline the evolution of engagement research and present a detailed description of the four phases of the theorizing process. The

paper concludes with a summary of key implications and future research avenues arising from our analyses.

S-D logic informed midrange theorizing

S-D Logic as a Paradigm

As this chapter examines the influence of the metatheoretical lens of S-D logic on the development of midrange theory, it is first important to revisit the broad evolution of the S-D logic as a paradigm to ground this discussion. S-D logic builds an alternative lens to the goods-centered model of economic exchange, which viewed units of output, embedded with value in the production process, as the central components of exchange (Merz et al., 2009). Vargo and Lusch (2004) suggested that marketing is evolving toward a service-based perspective of exchange, where customers are endogenous to value creation and, as such, constitute operant resources (resources that produce an effect) in contrast to operand resources (resources on which an operation is performed to produce benefit) (Merz et al., 2009). Since 2004, S-D logic (Vargo and Lusch, 2004) has been subject to several refinements. The original eight foundational premises (FPs) were expanded to ten FPs in 2008 (Vargo and Lusch, 2008), with increasing emphasis on resource-integrating processes as central to value co-creation. Further, the experiential nature of value was introduced, highlighting the context-specific nature of value (Akaka et al., 2013; Vargo and Lusch, 2008).

In 2011 S-D logic developed two important foci. The first was a more generic actor-to-actor orientation (Vargo and Lusch, 2011), recognizing that not only customers, but every actor is a co-creator of value and may be the recipient of value or act as the provider of a value proposition. The second focus was on identifying the service ecosystem as the ‘unit’ of analysis for value co-creation (Vargo and Lusch, 2011). The system perspective allowed the same phenomena to be looked at from different levels of aggregation, that is, from a micro, meso, and macro perspective.

In 2016, four of Vargo and Lusch's (2008) foundational premises were designated as axioms to more parsimoniously capture the S-D logic's general theoretical perspective (Vargo and Lusch, 2016). A level of conceptual refinement has occurred in several of the axioms, introducing new terminology to reflect a broader perspective, such as replacing 'customer' by the more general term 'beneficiary'. Further, the role of context and its effect on focal value co-creative mechanisms is highlighted. S-D logic asserts that value creation must be understood in the context of complex network relationships that are part of dynamic service ecosystems, comprising not only firms and customers but their social communities and other stakeholders (Merz et al., 2009).

This reasoning has resulted in the development of a fifth axiom focused on the role of institutions within endogenously generated service ecosystems (Brodie et al., 2016). Institutions and institutional arrangements are core to the most recent work on S-D logic. Koskela-Huotari and Vargo (2016) recognize institutions as context for resource integration processes and emphasize the collaborative, contextual and systemic nature of value co-creation. Taken together, the evolutionary pathway of S-D logic toward a new paradigm provides an integrating lens for value co-creation in networks. Accordingly, the core S-D logic narrative to guide academic research is based on the process of value co-creation by actors integrating resources, coordinated through shared, actor-generated institutions and institutional arrangements, nested in service ecosystems. (Vargo and Lusch, 2017).

S-D Logic as a Metatheoretical Lens for Midrange

Theorizing

A 'metatheoretical lens' provides a logically consistent and coherent general structure to define, refine and develop conceptual domains and midrange theories. In contrast to metatheories that seek to explain 'everything' about a general phenomenon (e.g. how markets function), midrange theories focus on a subset of phenomena relevant to a particular context (Brodie and Löbler, 2018). That is, midrange theories are anchored at a less abstract theoretical level

(Vargo and Lusch, 2017), and hence *provide more context-specific concepts and explanations* to address managerial or societal questions. In other words, *midrange theories aim to foreground underlying (causal) mechanisms and dynamics* of empirical phenomena to provide managerial actionability and a solid base for empirical investigations (Brodie et al., 2011b). In contrast, *metatheories inform managerial practice by offering a lens to view the general logic of market* that aids understanding the broader context in which the empirically observable phenomena are embedded.

Drawing on Vargo and Lusch (2017) and Brodie and Löbler (2018), we argue that S-D logic has evolved towards a metatheoretical lens and can be characterized by three criteria relevant to describe a new paradigm: first, as emphasized in the preceding section, S-D logic offers five *general axioms* that can be used to substantiate and formulate midrange theory. Second, the *S-D logic narrative* builds anchor points for various causal mechanisms (Hedström and Ylikoski, 2010), relevant to understand phenomena of today's networked age. Third, S-D logic provides a resistant *transcending lexicon*, which can be used to inform lexica of midrange theories across various contexts and in various application fields.

New paradigms (theoretical domain of knowledge) and/or new phenomena (empirical domain of knowledge) provide a starting point for theory development and, hence, for the process of theorizing (Brodie et al., 2011b). S-D logic as a paradigm can be seen as part of a general trend to rethink the nature of markets and societies and direct study towards networks, relations, institutions and social practices (Vargo and Lusch, 2016). As such, it responds to the challenges of today's networked age, where for example innovative business models disrupt markets by facilitating engagement, connections and shared practices between various actors (Brodie et al., 2016). S-D logic hence informs the understanding of broader networks and service ecosystems and consequently drives the theorizing process in our discipline closer to phenomena relevant for contemporary business environments, such as the rise of platform businesses, the sharing economy, or augmented reality.

S-D logic informed midrange theorizing supports the definition, delineation, refinement and re-conceptualization of less abstract phenomena, their causal mechanisms and empirical foundations. When reviewing recent S-D logic informed midrange theories, we uncovered three dominant theorizing styles: the narrative-based style, the typology-based style and the proposition-based style (Cornelissen, 2017). Merz et al. (2009), for example, followed the *narrative-based* theorizing style to develop a new brand logic based on the overarching principles of S-D logic, re-conceptualizing the branding process from a system perspective. In the same vein, Wieland et al. (2017) refined the concept of business models as a service strategy. The narrative-based theorizing style lays out a set of generative mechanisms explaining a general sequence of events that lead to particular outcomes. In contrast, the *typology-based* theorizing style specifies a typology that interrelates different dimensions to flesh out new concepts and causal interactions (Cornelissen, 2017). Karpen et al. (2012), for example, use the typology-based style to link S-D logic with a portfolio of six strategic capabilities to develop a conceptual model of strategic S-D orientation.

The most common theorizing style at a midrange theoretical level is arguably *proposition-based* theorizing, where theoretical ideas and arguments are channelled into a set of formal propositions that introduce new concepts and their cause–effect relationships (Cornelissen, 2017). Brodie et al. (2011a), Hollebeek et al. (2016) and Brodie et al. (2016) use this theorizing style to underpin the ‘conceptual domain of engagement’ within the S-D logic narrative. A key distinctive characteristic, which Brodie et al. (2011a) and later Hollebeek et al. (2016) deploy in their delineation of the conceptual domain of customer engagement, lies in the establishment of the concept’s theoretical roots by drawing not only on S-D logic’s metatheoretical lens but also on managerial literature and feedback from academic experts and practitioners. Thereby, the theorizing process fruitfully combines the theoretical and managerial domains of knowledge. This systematic combining of metatheory, midrange theory and empirical or managerial observation will be illustrated in the next sections, using the example of the evolution of engagement research, as engagement has developed into one of the central concepts of contemporary marketing theory and practice (Pansari and Kumar, 2016).

Evolution of engagement research

This section maps the evolution of engagement as a midrange theory. A chronological analysis of the literature reveals three phases of engagement research (see Table 33.1): the first phase (2009–2011) focused on identification and conceptualization of customer engagement, predominantly based on conceptual work. The second phase (roughly 2012 onwards) is characterized by increasing empirical research that resulted in the development of empirically refined conceptualizations and operationalization of customer engagement. The next phase, from 2014 onwards, witnessed enhanced applications that clearly divide into two streams drawing on different existing concepts and theories: the customer management stream and the S-D logic informed service ecosystems stream. The identified phases overlap to some degree and individual articles may deviate from this generalization.

Phase 1: Identification and Theory-Based

Conceptualization of Customer Engagement

Interest in customer engagement started to emerge in the early 2000s, spurred by a wealth of business conferences, seminars, managerial press and consultancy companies' initiatives focusing on measuring and utilizing customer engagement (Brodie et al., 2011a). In light of this practitioner interest in engagement, several scholars sought to provide greater clarity around the conceptualization of engagement. However, it was not until 2005 that the concept became apparent in the academic marketing literature, followed by papers explicitly focusing on customer engagement close to 2010. The first phase of engagement research can be described as the *identification and theory-based conceptualization of customer engagement*, roughly occurring between 2009 and 2011 (see Table 33.1). In 2010, the Marketing Science Institute identified customer engagement as a key research priority, and *Journal of Service Research* published a special issue on customer engagement that hosted a number of influential papers, thus setting the scene for a surge in engagement research.

Research published during the initial conceptualization phase viewed engagement as customer's voluntary behavior that goes beyond purchase, but has a brand or firm focus (e.g. van Doorn et al., 2010). Much of the literature focused on the behavioral manifestations of engagement from the perspective of how customers' actions such as word-of-mouth affect the firm, and how firms should adapt their customer management practices to respond to such activities (Kumar et al., 2010; Verhoef et al., 2010). Other studies focused on engagement as a customer's psychological state, linking it to brand-related concepts such as brand loyalty and commitment (Bowden, 2009; Hollebeek, 2011). A key development milestone was the article by Brodie et al. (2011a) that explicitly explored the conceptual foundations of customer engagement, and by drawing on S-D logic and relationship marketing, developed a set of propositions that delineated its conceptual scope.

Phase 2: Establishing Empirically Refined Conceptualizations, Nomological Network, and Measures for Customer Engagement

Next, customer engagement research advanced to a phase of *empirical inquiry and measure development for customer engagement* (Table 33.1). Researchers explored the nature and scope of the engagement concept, seeking to establish the relevant antecedents and outcomes of customer engagement (e.g. Vivek et al., 2012), and to operationalize it as a measurable concept (e.g. Hollebeek et al., 2014; Vivek et al., 2014). For example, Dessart et al. (2015) provided empirical evidence for the three customer engagement dimensions – cognition, affect and behaviors – suggested in previous conceptual work (Brodie et al., 2011a). A number of antecedents for customer engagement were identified, such as customer involvement (Vivek et al., 2012), trust (Bowden, 2009) and participation (Brodie et al., 2013). Furthermore, it was suggested that customer engagement results in positive outcomes such as loyalty (Vivek et al., 2012), commitment (Brodie et al., 2013) and brand connection (Hollebeek et al., 2014), but also potentially unfavourable consequences on the firm (Hollebeek and Chen, 2014).

The measures developed for customer engagement reflected the notion of customer engagement as a psychological state and/or behavioral manifestations of engagement both in online and offline environments. For example, Vivek et al. (2014) developed and validated a ten-item customer engagement scale, operationalizing customer engagement as comprising three dimensions: conscious attention, enthused participation and social connection. Hollebeek et al. (2014: 149) conceptualized consumer brand engagement as ‘a consumer’s positively valenced brand-related cognitive, emotional and behavioral activity during or related to focal consumer/brand interactions’, comprising cognitive processing, affection and activation dimensions.

Phase 3a: Developing Engagement as a Midrange

Theory for Customer Management

Around 2014, the literature domain of engagement had grown substantially and more dispersion in the foci of the research became clearly observable. One stream explicitly focused on the managerial implications of customer engagement, viewing it as the next step of consumer loyalty (e.g. Kumar and Pansari, 2016; Pansari and Kumar, 2016), leading to customer behaviors that contribute to firm marketing functions directly or indirectly (Harmeling et al., 2016; Verleye et al., 2014). This stream can be characterized as an attempt to develop *a midrange theory for customer management* (primarily considering engagement as an advanced form of customer management and relationship marketing. Research representing this stream is focused on exploring how customer engagement can be leveraged to achieve firms’ marketing objectives, considering that customers possess unique resources they can contribute for the firm’s benefit (Harmeling et al., 2016). While this research often builds on S-D logic derived conceptualizations on engagement (Brodie et al., 2011a), the studies do not draw on S-D logic or seek to explain broader ecosystem phenomena. Rather, there is a focus on the impact of psychological and behavioral manifestations of customer engagement on firm performance,

and the possibilities for firms to influence and manage customer engagement (Pansari and Kumar, 2016).

Phase 3b: Developing Engagement as a Midrange

Theory to Understand Value Co-Creation in Service ecosystems

The other key stream observable in contemporary engagement literature builds directly on the S-D logic based conceptualization presented by Brodie et al. (2011a). This stream sees engagement as *a midrange theory to understand value co-creation in service ecosystems* (see Table 33.1). Research by Hollebeek et al. (2016) elaborates on how customers invest operand and operand resources in customer–brand relationships, explicitly connecting it to S-D logic axioms. Other researchers have extended beyond the dyadic focus, to consider the role of engagement in broader service ecosystems. By grounding on the premises of S-D logic, Jaakkola and Alexander (2014) conceptualized customer engagement behaviors as customers’ diverse resource contributions toward the focal firm and other stakeholders, and analyzed how such behaviors affect broader value co-creation processes in the service ecosystem. A general shift from individually based engagement and dyadic relationships to broader systems of engagement can be observed in the most recent literature (e.g. Chandler and Lusch, 2015). Storbacka et al. (2016) broaden the perspective further by arguing that engagement is a general microfoundation for value creation, and extend the perspective to any service ecosystem actor, human or nonhuman. Emerging research by Brodie et al. (2016) echoes this view and seeks to broaden the domain of customer engagement to encompass general actors in systemic settings, framed by institutions and institutional arrangements.

The next section will explain the midrange theorizing process that has occurred as engagement research has evolved through these phases.

Table 33.1 Key development phases of engagement research

Perspective and selected references	Key focus	Primary theoretical / empirical basis
<i>Phase 1: Identification and theory-based conceptualization of customer engagement (CE) (2009–2011)</i>		
Customer brand engagement Bowden, 2009	<ul style="list-style-type: none"> • CE as individual customer’s psychological process • Nature and process of customer engagement 	<ul style="list-style-type: none"> • Literature on relationship marketing and brand loyalty
Hollebeek, 2011	<ul style="list-style-type: none"> • Individual customer’s motivational state 	<ul style="list-style-type: none"> • Underlying theory: S-D logic axioms, especially interactive and phenomenological nature of customer experience and value creation • Literature on learning and knowledge sharing
Influence of CE on the firm van Doorn et al., 2010 Verhoef et al., 2010 Kumar et al., 2010	<ul style="list-style-type: none"> • Behavioral manifestations of engagement by consumers • Management of customer engagement • Engagement value of customers 	<ul style="list-style-type: none"> • Literature on customer relationship management, brand loyalty, word-of-mouth and customer value
Conceptual foundations of CE Brodie et al., 2011a	<ul style="list-style-type: none"> • Establishing a general definition for CE as a concept with cognitive, emotional and behavioral elements, reflecting a psychological state occurring within dynamic iterative processes 	<ul style="list-style-type: none"> • Underlying theory: S-D logic axioms, especially interactive and phenomenological nature of customer experience and value creation • Literature on relationship marketing and service management • Supporting disciplines: sociology, political science, psychology and organizational behavior • Business practice literature

<i>Phase 2: Empirically refined conceptualizations, nomological network, and measures for customer engagement (2012 onwards)</i>		
Nature and scope of engagement Vivek et al., 2012	<ul style="list-style-type: none"> • Behavioral manifestations of engagement • Customer's interactive experiences with a firm • Proposing antecedents and outcomes for CE 	<ul style="list-style-type: none"> • Relationship marketing • Empirical data
Customer engagement in brand communities Brodie et al., 2013 Dessart et al., 2015	<ul style="list-style-type: none"> • Focus on CE as an individual's psychological state, also acknowledging other consumers • Identifying CE outcomes related to the focal customer 	<ul style="list-style-type: none"> • Underlying theory: S-D logic • Literature on relationship marketing, online communities, word-of-mouth and brand communities • Empirical data
Measuring CE Vivek et al., 2014 Hollebeek et al., 2014 So et al., 2014	<ul style="list-style-type: none"> • Individual customer's interactive, reciprocal relationship with a focal agent/object 	<ul style="list-style-type: none"> • Underlying theory: S-D logic, especially interactive nature of value creation • Literature on relationship marketing and consumer involvement • Empirical data
<i>Phase 3a: Development of customer engagement (CEM) as a midrange theory for customer management (2014 onwards)</i>		
Managing customer engagement behaviors (CEB) Verleye et al., 2014	<ul style="list-style-type: none"> • Behavioral manifestations of engagement • Customer's interactive experiences with a firm • Acknowledging impact of CEB on other stakeholders 	<ul style="list-style-type: none"> • Literature on customer voluntary behaviors, organizational socialization • Empirical data
CEM as relationship management Kumar & Pansari, 2016 Pansari & Kumar, 2016	<ul style="list-style-type: none"> • Behavioral manifestations of engagement • Focus on individual consumers and employees 	<ul style="list-style-type: none"> • Literature on customer relationship management • Empirical data
CEM as a marketing application	<ul style="list-style-type: none"> • Customer engagement marketing as a firm's strategic effort 	<ul style="list-style-type: none"> • Literature on relationship marketing, promotion marketing, consumer experience

Harmeling et al., 2016	<ul style="list-style-type: none"> • Firms' efforts in triggering CE and individual customer's CE 	<ul style="list-style-type: none"> • Business examples; empirical data
<i>Phase 3b: Development of engagement as a midrange theory to understand value co-creation in service ecosystems (2014 onwards)</i>		
Customer engagement in service system level Jaakkola & Alexander, 2014	<ul style="list-style-type: none"> • Behavioral manifestations of engagement • Focus on individual citizens and other actors in the service system affected by CEB • Identifies how CEB connects with resource integration • Explores CE outcomes beyond the focal customers 	<ul style="list-style-type: none"> • Underlying theory. S-D logic, especially value creation through resource integration • Literature on customer extra-role behaviors • Primary data from versatile stakeholders
Connection of customer engagement with resource integration Hollebeek et al., 2016	<ul style="list-style-type: none"> • Customer investment of resources into brand interactions in service systems 	<ul style="list-style-type: none"> • S-D logic: resource integration, operand and operant resources
Engagement by general actors Storbacka et al., 2016 Brodie et al., 2016	<ul style="list-style-type: none"> • Engagement by general actors (including non-human actors) • Engagement entails both actor disposition to engage, and the activity of engaging • Argues that engagement underlies the process of value co-creation 	<ul style="list-style-type: none"> • S-D logic: value co-creation through resource integration, institutional context for engagement

Abstracting engagement theory – From S-D logic metatheory to theory-in-use and back

Customer engagement has undergone two iterative theorizing processes to develop into an S-D logic informed midrange theory: the process of discovery and the process of justification (Yadav, 2010). Through these processes customer engagement has bridged the theoretical domain of knowledge (S-D logic as a metatheory) with the empirical domain of knowledge (evidence-based research and theories-in-use) (Brodie and Löbler, 2018; Brodie et al., 2011b). Figure 33.1 demonstrates how metatheories provide the foundation for causal mechanisms and propositions that are associated with midrange theories, a process termed *formulating and substantiating* (Hunt, 1983; Yadav, 2010). In the next stage, these causal mechanisms are translated into problem statements (research questions or hypotheses) of specific empirical contexts: *formulating and interpreting*. These two stages of the theorizing process refer to the context of discovery, where (new discovered) phenomena are linked to a paradigmatic view and systematically narrowed to empirically observable causal relationships (Brodie et al., 2011b). Further, Figure 33.1 depicts the context of *justification*, which includes the use of empirical findings or theories-in-use to provide contextual descriptions that serve as a basis for empirical generalizations. Empirical findings are used to shape the scope of midrange theories, a process termed *shaping and verifying*, and, in turn, may be consolidated on a more abstract level to refine metatheories (Brodie et al., 2011b; Vargo and Lusch, 2017) (i.e. *verifying and consolidating*). The four stages of the theorizing process run iteratively and may either start in the empirical domain of knowledge or in the theoretical domain of knowledge.

This section will illustrate the four stages of the theorizing process and discuss how engagement research has broadened its perspective beyond the dyadic focus, to a network-centered phenomenon. Further, it will demonstrate how the evolution of the midrange theory of customer engagement has verified and consolidated developments in the S-D logic narrative.

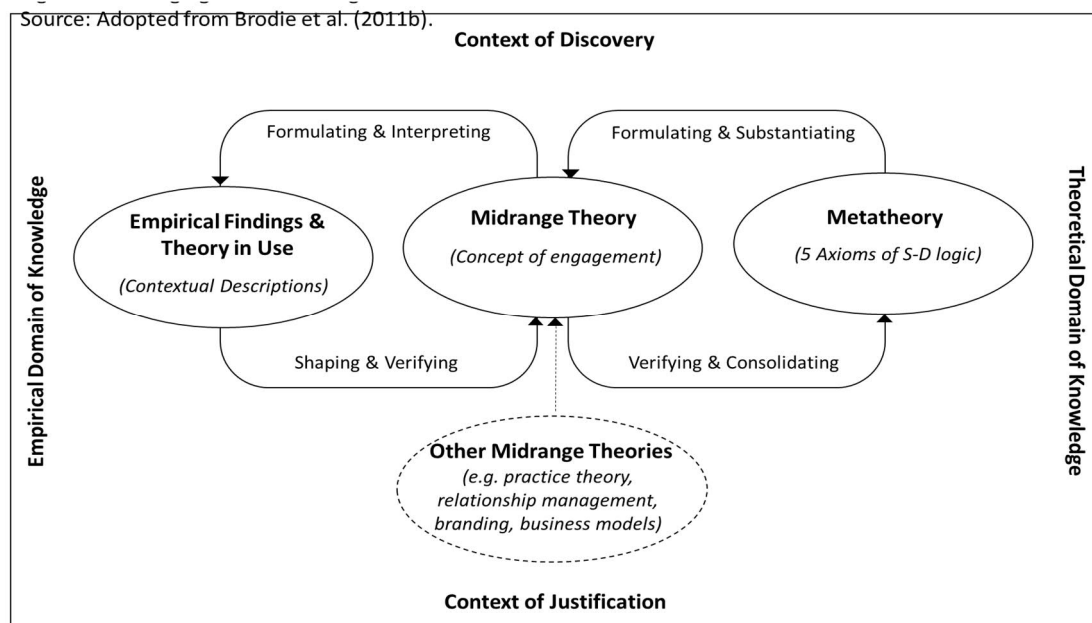


Figure 33.1 Bridging role of midrange theories

Shaping and Verifying

The development of engagement midrange theory started in the empirical domain of knowledge and draws from observations of business practice to inform the understanding of the phenomena (Brodie et al., 2011a; Vargo and Lusch, 2017). Consistent with the notion that theories in use and business practice shape and verify the understanding of a midrange theory, the initial phase in the evolution of customer engagement literature saw authors signal that customer engagement was emerging as a cutting-edge phenomenon in the business press (e.g. *Harvard Business Review*; Koehn, 2010; Prahalad and Ramaswamy, 2000). Further, authors evidenced that this phenomenon was being applied in practice, with a number of well-known consulting firms developing proprietary measurement and management tools designed to leverage customer engagement (Brodie et al., 2011a). This practitioner activity was responsible for shaping preliminary interest in customer engagement and the term gained prevalence in both the business press and academe (Brodie et al., 2011a). From this industry discourse a number of core traits of engagement emerged: engagement was understood as an interactive customer experience, especially in online environments (Nambisan and Nambisan, 2008), and reflected

a co-creative activity (Prahalad and Ramaswamy, 2000), used to enhance customer relationships with the firm/brand (Baird and Parasnis, 2011). This was consistent with the narrative of S-D logic, which focused on customers as co-creators of value and recognized that the service-dominant perspective was inherently relational (Vargo and Lusch, 2008).

As the literature on customer engagement evolved into its second phase (see Table 33.1), the midrange theory was further verified and advanced through ongoing empirical examination that tested the propositions and hypotheses associated with the concept (Brodie et al., 2011b). As preliminary conceptualizations of customer engagement emerged, researchers interpreted the concept and developed measurement models to enable empirical examination (see the section on *formulating and interpreting*). This empirical work provided an understanding of the nomological network of customer engagement and its implementation in practice. These studies examined the relationship between customer engagement and other concepts consistent with the S-D logic paradigm, with consideration given to relational-oriented constructs such as involvement and participation (Leckie et al., 2016), experiences (Altschwager et al., 2017) and co-created content (Malthouse et al., 2016). Further, examination of the process of customer engagement enabled an understanding of its connections with activities such as knowledge sharing, co-developing, socializing and other practices complementary to an S-D narrative (Brodie et al., 2013; Hollebeek et al., 2016; Sashi, 2012). Thus, empirical findings provided clarity for the conceptual understanding of customer engagement and how it aligns with other concepts within the S-D paradigm. This helped clarify and shape the understanding of customer engagement, initially from a dyadic perspective and, later, in Phase 3b of its evolution (see Table 33.1), from a networked perspective.

Formulating and Interpreting

Having established an initial conceptualization of customer engagement from the business literature in Phase 1, Phase 2 (see Table 33.1) of the evolution of customer engagement saw researchers seeking to interpret these perspectives and formulate measurement models to enable

further empirical investigation of the construct in various contexts. Several researchers pursued this objective concurrently, and distinct measures of customer engagement were developed that reflected the dyadic relationship between the individual and a focal object. These measures reflected the notion of customer engagement as a psychological state and/or behavioral manifestations of engagement both in online and offline environments. Although these measurement models had unique characteristics, they depicted the fundamental tenets of both S-D logic and customer engagement, capturing interaction (So et al., 2014), cognition, affection and behavioral (operand and operant) resource investment with the focal object (Brodie et al., 2011a; Hollebeek et al., 2016), as well as social or relational connections (Calder et al., 2009; Vivek et al., 2014). These tenets were reflective of both the conceptual understanding of customer engagement and the overarching metatheory of S-D logic (see the section on *formulating and substantiating*). Formulating an operational understanding of customer engagement allowed for empirical examination of the construct through quantitative methods (e.g. Altschwager et al., 2017; Leckie et al., 2016), interpretive methods (e.g. Jaakkola and Alexander, 2014) and multi-method approaches (Brodie et al., 2013). The empirical findings subsequently shaped and verified the concept of customer engagement.

While the notion of customer engagement from a dyadic (customer–firm) perspective went through the process of formulating and interpreting, the evolved notion of actor engagement (as depicted in Phase 3b) is a relatively recent phenomenon and has rarely been subject to this phase in the scientific circle of enquiry (Breidbach and Brodie, 2017; Storbacka et al., 2016). There is evidence that this phase in the theorizing process will soon follow, with empirical research on actor engagement encouraged in upcoming special issues on actor engagement in networked environments (*Journal of Service Management* and *Industrial Marketing Management*) at the time of writing.

Formulating and Substantiating

Critical for the engagement conceptualization was the guidance by a metatheoretical lens during the discovery process (Brodie et al., 2011b). In conceptualizing the observed phenomenon of customer engagement in Phase 1 of its evolution (see Table 33.1), researchers drew from the S-D logic perspective, as it provides a transcending view of relationships, centered on interactive experiences taking place in complex, co-creative environments suitable for explaining engagement as a phenomenon (Brodie et al., 2011a; Vargo and Lusch, 2009). The abstraction from the metatheory of S-D logic to the midrange theory of customer engagement is evidenced by the parallels between the core tenets of engagement and the narrative in S-D logic. Both research domains place the customer as an active participant in service exchange, with recognition of engagement being an interactive process towards the co-creation of value (Brodie et al., 2011a). The notion that customer engagement is a behavior that is beyond purchase (van Doorn et al., 2010) reflects the relational nature of the exchange. Further, the customer engagement literature points to the agency of the customer in this interaction, with recognition of engagement as a psychological state (Brodie et al., 2011a) or being motivationally driven (Mollen and Wilson, 2010). Brodie et al. (2011a) and later Hollebeek et al. (2016) explicitly abstracted from the foundational premises and axioms of S-D logic to develop fundamental propositions of customer engagement, with interactive customer experiences and co-created value as underlying conceptual foundations.

As the S-D logic narrative evolved, it introduced an actor-to-actor perspective that established the broader perspective of the service ecosystem in this field of academe (Vargo and Lusch, 2011). This allowed for the phenomenon of customer engagement to develop in parallel and encapsulate a broader network or service system view (Phase 3b). The evolved metatheory of S-D logic provided a mechanism to explain how customers engaged with other actors and integrated resources to create value for multiple actors within the service system (e.g. Jaakkola and Alexander, 2014). Further, Chandler and Lusch (2015) drew from this evolved S-D logic perspective to position engagement as the key phenomenon that connects actors within a service system. They proposed value propositions as invitations from actors to one another to engage

in service, engagement as alignment of connections and dispositions, and service experience as many-to-many engagement within the service system. Brodie et al. (2016) revisited the earlier theorizing process and utilized S-D logic metatheory to *formulate and substantiate* revised fundamental propositions of customer engagement for the express purpose of reflecting an actor engagement perspective. This process abstracted from the revised five S-D logic narrative and considered the role of generic actors as resource integrators within service systems, comprising not only firms and customers but other actors and their institutional arrangements (Brodie et al., 2016). As such, the actor engagement construct evolved the midrange theory of engagement by encapsulating the institutional perspective introduced to the S-D logic narrative (Koskela-Huotari and Vargo, 2016).

Verifying and Consolidating

In the process of theorizing, the evolving midrange theory can be used to verify and consolidate the general theory and refine and expand its scope (Brodie et al., 2011b). While several engagement-related articles have contributed to verifying, consolidating and potentially shaping the metatheory of S-D logic, we use the article of Storbacka et al. (2016) to illustrate how this stage of the theorizing process occurs.

Storbacka et al. (2016) utilized an adapted Coleman's bathtub, a framework for social scientific theorizing (Hedström and Ylikoski, 2010), to explicate the role of actor engagement in explaining the conceptual association between the service ecosystem, and its institutional arrangements, and the notion of value co-creation. In this regard, Storbacka et al. (2016) position actor engagement as a necessary condition for resource integration and a microfoundation of value co-creation within a service ecosystem. Their focus on actor engagement contributes to the metatheory of S-D logic by explicating and expanding the notion of an actor, creating a deeper understanding of the nature of the interface between actors in a service system, and defining resource integration patterns as a combination of actors, engagement platforms, actor dispositions and engagement properties (Storbacka et al., 2016).

Thus, S-D logic as a metatheory gets shaped on a lower level of theoretical abstraction by developing causal mechanisms of actor engagement and its nomological network, which in turn shed light into value co-creation on a consolidated metatheoretical level.

In addition to the work of Storbacka et al. (2016) there is an emerging body of research that emphasizes the reciprocal, social and collective nature of engagement (Chandler and Lusch, 2015) synonymous with Phase 3b of the engagement literature evolution depicted in Table 33.1. Chandler and Lusch (2015) and Jaakkola and Alexander (2014) take a service system perspective of engagement and consider how an individual actor is affected by the engagement behaviors that occur within that system. By arguing that engagement underlies the process of value co-creation (Chandler and Lusch, 2015) and identifying how customer engagement behaviors therefore connect with resource integration (Jaakkola and Alexander, 2014), this research thus deepens our understanding of how the S-D logic narrative manifests in causal mechanisms at a lower level of abstraction.

Consideration of Other Midrange theories

The development of customer and actor engagement as a midrange theory is further justified and shaped by other midrange theories (Brodie and Löbler, 2018), both within and outside the field of marketing. While the evolution of customer engagement has been influenced by several midrange theories, among the most notable are relationship marketing (van Doorn et al., 2010; Vivek et al., 2012), branding (Hollebeek et al., 2014), social practice theory (e.g. Kolaly et al., 2016), regulatory theory (e.g. Solem and Pedersen, 2016) and platform business models (e.g. Breidbach and Brodie, 2017; Fehrer et al., 2016). Next, we illustrate the role of two of these central midrange theories, relationship marketing and social practice theory, in the evolution of the engagement research.

Given the relational nature of customer engagement, many authors in Phases 1 and 2 (see Table 33.1) drew conceptually from the field of *relationship marketing* and service management. For example, in defining and delimiting customer engagement, Vivek et al. (2012) highlight a

stream of relationship marketing literature (e.g. Morgan and Hunt, 1994; Prahalad and Ramaswamy, 2004) that focuses on the interactions among customers, prospects, communities and organizational networks (i.e. a service system) with a focus on experience as value. As the theorizing process moved to empirical research to shape and verify the engagement concept, many relational constructs were identified as antecedents (e.g. participation, involvement; Leckie et al., 2016; Vivek et al., 2012) or outcomes (e.g. customer value, brand loyalty, trust, word-of-mouth; Bowden, 2009; Vivek et al., 2012) of customer engagement.

Social and relational interactions among customers are inherent in the notion of customer engagement. Hence, authors have drawn from theories that explain social phenomena, such as *social practice theory*. The practice theory perspective is consistent with the notion of operant resources, as well as institutional arrangements and service ecosystems as considered in the S-D logic narrative (Vargo and Lusch, 2017). Kolaly et al. (2016) advance the conceptualization of customer engagement by reconciling S-D logic with social practice theory to explore the dynamic nature of customer engagement and identify cognitive, emotional and social engagement practices, hence expanding the previous work of Schau et al. (2009), which examines value creation in brand communities.

In sum, as the development of engagement research exemplifies, there are three primary sources of inputs into the theorizing process: (1) the metatheoretical lens or narrative (e.g. S-D logic), (2) practical observations and empirical findings, and (3) other midrange theories and concepts. While the above discussion is not exhaustive, it illustrates the role of these inputs in the evolution of customer engagement within the S-D logic narrative from a dyadic to a network-level phenomenon.

Discussion, Contributions and Future Research Avenues

This chapter has examined how S-D logic as a metatheory can inform, and be informed by, midrange theory development, by analyzing how engagement research has developed through a multi-level theorizing process. We presented a theorizing process that draws on the S-D logic narrative and recent phenomena of contemporary business environments through a context of

discovery and context of justification, and thereby systematically combines the theoretical with the empirical domain of knowledge to support the definition, delineation, refinement and (re)conceptualization of the engagement concept, its causal mechanisms and empirical foundations. This process is worthwhile as the development of midrange theory has been considered pivotal for S-D logic to move forward (Vargo and Lusch, 2017) and, thus, it is essential to provide frameworks that can guide S-D logic informed midrange theorizing.

The contribution of this chapter is threefold. First, by tracking the key development phases of engagement research and the primary source of input contributing to the evolving conceptualization, we can map different development paths of engagement as a midrange theory (Figure 33.2). Our analysis showed that early customer engagement conceptualizations were theory driven and focusing on the customer–firm dyadic relationship. These conceptualizations drew on streams of literature that can be considered as related midrange theories, most notably relationship marketing and service management (see Table 33.1 and Figure 33.2). The Brodie et al. (2011a) article functions as an intersection after which two sub-streams of engagement research started to emerge. The first sub-stream considered engagement as a form of customer extra-role behaviors (e.g. Verleye et al., 2014) and its conceptualization as an extension of existing midrange theories such as relationship marketing (e.g. Kumar and Pansari, 2016). This sub-stream reflects an attempt to develop customer engagement based on a customer management perspective. It enriches existing literature from conceptual to increasingly evidence-based research and thereby shapes engagement theory. It provides context-specific guidance to stimulate, manage and facilitate engagement behaviors in order to generate strategic benefits.

The other sub-stream (see Figure 33.2) marks midrange theory dealing with value co-creation processes in service ecosystems drawing on S-D logic as an underlying metatheory (Brodie and Storbacka, 2014; Jaakkola and Alexander, 2014). Some of this research is focusing on the customer–firm relationships and progressing towards empirical applications (e.g. Hollebeek et

al., 2014), while others have adopted more systemic approaches, moving beyond customer–firm dyads to also consider other ecosystem actors (Jaakkola and Alexander, 2014).

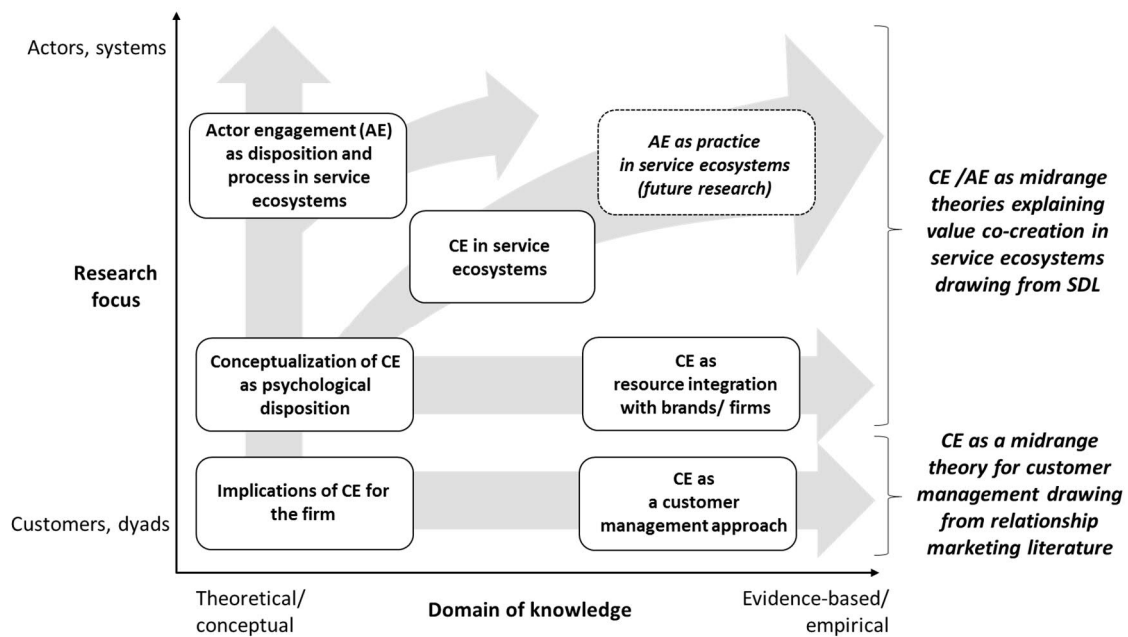


Figure 33.2 Development of engagement research as a midrange theory

Second, we demonstrate how multi-level theorizing, that is, drawing on a metatheory (S-D logic) as opposed to advancing an existing midrange theory (i.e. relationship marketing), enables researchers to zoom out from a dyadic customer–firm focus to a systemic or network perspective. S-D logic provides a lens that covers multiple perspectives, which allows for understanding engagement at a micro level, while viewing it from a meso level (i.e. engagement practices in triads) and/or from a macro level (i.e. governance through engagement within an ecosystem) (Chandler and Vargo, 2011; Vargo and Lusch, 2017).

Third, this chapter helps researchers to distinguish between a metatheoretical lens, the midrange theory and evidence-based research or theories-in-use and how all these theoretical hierarchies can be systematically combined in order to enrich each end – the theoretical domain of knowledge and the empirical domain of knowledge. We demonstrate how the midrange theorizing process of engagement has been formulated and substantiated by abstracting from S-D logic metatheory, and shaped and verified by drawing from empirical findings and

theories-in-use. This analysis answers recent calls to advance midrange theory development for S-D logic (Vargo and Lusch, 2017) and demonstrates the applicability of the framework developed by Brodie et al. (2011b) in illustrating and analyzing the context of theory discovery and theory justification and how both contexts can and should be fruitfully combined to explain and predict emerging phenomena in our discipline.

In terms of future research implications, Figure 33.2 illustrates that the most recent engagement research is moving towards a system perspective, providing theory-based examination of actor engagement as a process of interactions between multiple actors (i.e. engagement practices and patterns) on interconnected platforms in a service ecosystem (Brodie et al., 2016; Storbacka et al., 2016). As the next step, we anticipate further development of these conceptualizations, again occurring through the process of formulating and interpreting in the interface of the empirical domain of knowledge. Thus, S-D logic will become further informed by evidence-based engagement research and enriched with contexts, models, (causal) mechanisms and practices to more precisely explain value co-creation within an ecosystem.

This chapter points in particular at the emerging area of system-level research on actor engagement, where empirical studies are as yet missing. Recent conceptual research indicates interesting avenues for future empirical investigations. For example, researchers could examine how platforms can facilitate engagement practices of multiple actor groups (Breidbach and Brodie, 2017). It has been suggested that engagement practices may function as a system (self-)governance mechanism (e.g. in terms of engagement loops where one actor is reviewing the activity of another actor and vice versa; Fehrer et al., 2016), guaranteeing quality and facilitating trust within networks (Parker et al., 2016), warranting empirical investigations. Other future research initiatives should continue to develop and verify the midrange theory of customer engagement based on advances in the evolution of the S-D logic narrative. Given the introduction of a fifth axiom recognizing the role of institutions and institutional arrangements in S-D logic, future empirical work is expected to consider actor engagement in multiple-actor contexts framed by institutional arrangements. These advances to the conceptual understanding of actor engagement will further shape and refine the metatheory of S-D logic.

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