1. INTRODUCTION

Retailing has changed dramatically in the last two decades. Customers have rapidly expanded their channel experiences and preferences beyond traditional channels over time. Accordingly, firms have recognized the importance of increasing their channel variety through a multichannel experience in order to better address these diverse consumers’ needs. At first companies were involved in decisions as to whether add new channels to the existing channel mix; typically online channels for traditional brick-and-mortar players (e.g., Geyskens, Gielen, and Dekimpe 2002; Deleersnyder et al. 2002), and offline presence for online players (Avery et al. 2012). Today, customers not only expect the company with which they do business to have a presence in all these channels, but they also expect to smoothly navigate across different channels and touchpoints. We have now moved to a new phase in retailing (the so-called omnichannel shopping), where customers expect a seamless omnichannel experience where the distinctions between offline and online channels is less evident (Brynjolfsson, Hu, and Rahman 2013). This results in complex journeys and paths to purchase (Lemon and Verhoef 2016). Understanding and managing the customer journey process is a major concern of most organizations as well as a fundamental issue in marketing research (see MSI research priorities 2018)\(^1\).

Companies to face competition and to satisfy customers’ needs must proactively manage the customer journey process, and be present on multiple channels. A diversified and well-integrated channel mix represents an opportunity for companies to attract new customers, to retain most profitable customers, and to position and differentiate the brand. Indeed, business press emphasizes the advantages of this strategy, but it also highlights that integrating digital

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and traditional physical channels is not trivial; moving the discussion not on whether but on how to adopt an omnichannel strategy (Financial Times, Future of retail summit, Sept 2018; Bianchi, Cermak, Dusek, 2016). Issues such as the integration of the marketing activity and retail mix across channels is becoming a central focus (Bell et al. 2014; Verhoef et al. 2015).

Why integrating channels and touchpoints is so difficult? What is behind this complexity?

A significant portion of this complexity has to do with the customer decision process. Today, the customer path to purchase is intricate. Customers recognize a need, search for information for a product or service, purchase the product, and then seeks after-sales service. Along this way, customers can access various channels and touchpoints at various and competing companies. Imagine an individual surfing her Facebook page. A sponsored post by FitBit about a new smartwatch for runners attracts her attention. While watching this post she matures the desire for a smartwatch (need phase). She shares this post to her friend to ask for suggestions. In the subsequent weeks she starts actively searching for a smartwatch: she visits the website of different competing brands (e.g. FitBit, Garmin, Polar, Apple etc.), she also visits a couple of physical stores to try the smartwatches she included in her consideration set, and she checks prices on Amazon (search phase). Finally, she purchases the product at the Garmin e-commerce website (purchase phase). After the purchase, she decides to take advantage of the Garmin.com chat support for issues with the update with the latest software of the smartwatch (after purchase phase). The experience with the online purchase through the website was great, but the chat support was not that helpful. This story highlights three important points:
1) Understanding, predicting and managing the customer behavior across channels is not trivial;
2) The initial phases of the customer decision process (need and search) are critical phases because they are able to trigger the need for the product, to increase the likelihood that the brand will be included in the consideration set, and that the individual will share information about the brand to other peers;
3) After the purchase, the customer will evaluate channel experiences. These evaluations will have an impact on relevant outcome variables for firms such as repurchase intention, amount spent, word of mouth, emotional reactions, and formation of expectations about the brand.

What is the implication of such situation for the research agenda in this field?

This project identified three critical area of research that characterize the objectives of this project. The first is the study of drivers of channel choice. The second is the study of channels and touchpoints such as social media that play a key role in the initial phases of the decision process with the purpose of identifying the best strategies to maximize attraction, engagement, and acquisition of the customer base. The third is the study of the relationships existing between the use of different channel combinations and two macro classes of outcome variables: behavioral outcomes (such as trial, frequency of purchase, and amount spent), and relational outcomes (such as customers’ expectations, satisfaction, emotional reactions, and word of mouth).

This proposal is structured as follows. Paragraph 2 summarizes the research questions and motivates them. Paragraph 3 summarizes the study plan and the intended contributions of this

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2. OBJECTIVES OF THE RESEARCH

This proposal aims at adopting a multi-method approach to study three critical area of research. Figure 1 summarizes the conceptual framework that guides this research proposal.

Research Objective 1: The first aim of this project is to provide a deeper understanding of how drivers of channel choice have been considered in the literature. To do so, this project aims to use a meta-analysis on antecedents and consequences of channel choice to obtain more insight in a field of research (i.e., customer channel choice) rather than in a specific relation.

Motivation of the research objective 1

The stream of literature investigating determinant and consequences of channel choice is mature and can be investigated through a meta-analysis. Research in this domain started in the eighties with the study of store choice (see Wrigley 1988 for a review). Later the focus switched on multi-format choice (e.g. Messinger and Narasimhan 1997; Fox et al. 2004;
Kumar 2004; Inman Shankar and Ferraro 2004), then on multichannel choice (e.g. Thomas and Sullivan 2005, Ansari et al. 2008), and more recently omnichannel shopping behavior (see Verhoef et al. 2015 for a review). Channel choice, and more specifically the channel used to purchase, represents the most heavily researched area of multichannel customer management (see Blattberg et al. 2008, p.641 for a review). Blattberg et al. 2008 summarize six factors that determine customer channel choice: 1) marketing activity of the firm, 2) channel attributes, 3) social influence, 4) degree of channel integration, 5) individual differences, and 5) situational factors. The drivers of channel choice and their relative impact characterize the channel choice decision process. The existence of a large set of empirical works represents an interesting opportunity for a meta-analytic study.

Results in the literature are heterogeneous and change depending on different contextual, methodological, and managerial factors that moderates the effects reported in the literature. For example, studies differ depending on the types of marketing activities investigated (e.g. financial vs. non-financial incentives), on the types of channel attributes, on the number and types of channels analyzed, on the method used to model channel choice (e.g. techniques used to deal with unobserved heterogeneity), on the country, on the industry, etc.

A meta-analytic study can assess whether and how contextual and methodological factors have moderated the effects found. It can also generalize the findings of a significant portion of studies, allowing researchers to obtain generalized findings on both channel choice outcomes and their antecedents.

**Research Objective 2:** The second aim of this project is to shed light on the role of channels and touchpoints in the first part of the customer decision process (see Figure 1). The purpose is to understand how companies can use social media to trigger the need and shape search phases, to attract prospects and generate engagement. Additionally, the idea is to show which online contents are more effective and how social media campaigns should be designed over time to generate “earned media”, and to boost conversion and acquisition rates.

**Motivation of the research objective 2**

Companies need to deal with individuals who are always connected, and do expect to constantly interact with firms through multiple channels and social media over time. This represents an opportunity because firms can interact with individuals since the very first phases of the path to purchase process. Potential customers shape their needs and retrieve information about products in these initial phases.

Business press highlights that individuals spend a significant portion of their time navigating the web. On average fifty minutes per day on platforms such as Facebook, Instagram, Twitter and YouTube (Stewart, New York Times, May 2016). Accordingly, most brands have created corporate profiles on social media and send an average of 1.5 Facebook posts to their fans (Smith, 2015) with the purpose of cultivating a fan base, and motivate it to share their digital campaigns. Indeed, these campaigns are increasingly designed to generate the so-called “earned reach”, which occurs when consumers themselves become the channel of the delivery of a firm’s message, by sharing it with their friends. The purpose of this project is to contribute in this area of research by examining how social media can be used to generate engagement and increase conversions and acquisition of the customer base.

More specifically the focus is on the following sub-set of questions: How rebroadcasting of online contents can be achieved? What drives rebroadcasting activity? Can companies design marketing campaigns using their corporate pages to boost rebroadcasting? What type of online content is more effective? How companies should alternate different types of online
contents to attract the interest of their fan base and to maintain the level of engagement high? How social media campaigns should be designed over time to boost “earned media”, conversion and acquisition rates? What types of social media marketing campaigns work best for different prospects and groups of individuals?

Previous literature has investigated the role of factors such as emotional contents (e.g., Berger and Milkman 2012), post characteristics (de Vries, Gensler, and Leeflang 2012), fit and promotions (Valentini, Montaguti, Vecchioni 2017) in triggering engagement. However, we are still unaware of the impact that variation of different types of online contents has on engagement. Additionally, online content characteristics might have different impact on different segments of users.

To address this research objective the idea is to use a multi-methods approach will be used: predictive modeling of secondary data (e.g. panel data recording posting activity of a set of companies and of users’ reactions to these posts) and a set of field experiment done in collaboration with companies to assess the causal link between variation of posting activity over time and user’s engagement, and to estimate the probability of reaction of different groups of individuals.

**Research Objective 3:** The third aim of this project is to focus the attention on the last part of the decision process (see Figure 1) and investigate the role of specific mix of channels and touchpoints in shaping behavioral and attitudinal outcomes.

**Motivation of the research objective 3**

Prior research in marketing has shed light on the impact of the multichannel shopping experience on behavioral outcome variables by focusing on revenues, profitability and retention. There is consensus in both the academic literature and in real-word practices around the idea that customers who use multiple channels (multichannel customers) are more valuable customers than single-channel users (Thomas and Sullivan 2005, Kumar and Venkatesan 2005; Venkatesan, Kumar and Ravishanker 2007; Ansari, Mela, and Neslin 2008; Neslin and Shankar 2009). This finding has gained further support from studies that ruled out the possibility that the association between multichannel shopping and revenues depend entirely on customers self-selection (Campbell and Frei 2010; Gensler, Leeflang and Skiera 2012; Montaguti, Neslin and Valentini 2016). Although an increase in the use of multiple channels has been shown to be positively associated with profitability, previous literature did not investigate the impact of the specific channel combinations on frequency of purchase and volume. Existing literature assume that the benefits generated by the multichannel shopping experience are independent of the combination of channels consumers decide to select. A notable exception is represented by Avery et al.’s work (2012) showing that the impact of a new channel entry on the existing channels sales varies with degree of a new channel’s complementarities with existing channels. Building on this work, this project proposes that the impact of multichannel shopping behavior on profitability and retention depends on specific combination of channels consumers use. Additionally, literature has disregarded the impact of past channel choice behavior on relational outcomes such as: formation of customer expectations, satisfaction, emotional reactions, word of mouth. Customers during their path to purchase select different combination of channels in both their search phases and purchase phases. The purpose of this project is to test the impact different channel mix on word of mouth activity, formation of positive or negative emotions towards the company, and future expectations.
To investigate these questions, we will use both panel data recording search and purchase activities occurring across different channels and platforms at the individual level. To secure these data we will activate partnership with omnichannel retailers owning individual level data of its customer base. We will also use survey data and experimental design as the methodology to collect data about relational outcomes and to isolate the cause-effect relationships between the target variables.

3. RESEARCH PLAN, STEPS AND INTENDED CONTRIBUTIONS

Figure 2 provides a summary plan of the research activity of this project and Figure 3 illustrates a graphical representation of the timing of research activities.

Figure 2: Summary Plan Description

**Research Objectives:**
1. How different drivers of channel choice have been considered in the literature? How contextual and methodological factors moderate the effect of antecedents and consequences of channel choice behavior?
2. How companies can use social media to trigger the need, attract prospects and generate engagement? How social media campaigns should be designed over time to generate "earned media", and boost conversion and acquisition rates? What types of social media marketing campaigns work best for different prospects and groups of individuals?
3. What is the impact of the use of different channel mix on behavioral (incidence and volume) and attitudinal outcome variables (satisfaction, won, emotional reactions, expectations)?

**Steps and Methodology:**
- **Method:** Meta-Analysis
  - Step 1.1: Literature review, selection of the effect size metric and creation of the database
  - Step 1.2: Assessment of the strength and the variability of each relationship, homogeneity test
  - Step 1.3: Estimation of the moderator model and summary of the results

- **Method:** Predictive model estimation + Field Experiment
  - Step 2.1: Creation of a dataset containing information about posting activity of different brands fan pages over time.
  - Step 2.2: Content analysis of posting activity. Analysis of the impact of different types of posting strategies on sharing activity.
  - Step 2.3: Design of the set of field experiments done in collaboration with companies and analysis of the results

**Intended contribution:**
- **For researchers:** Provide and empirical generalization of the key drivers of customers' channel choice, highlighting directions for future research.
- **For practitioners:** Provide in-depth understanding of mechanisms behind omnichannel shopping behavior, assessment of the relative strength of marketing effectiveness and of the moderating role of different contexts and types of marketing actions.

- **For researchers:** Extend the understanding of how engagement, conversion and acquisition can be achieved by focusing on the impact of different types of online content strategies over time.
- **For practitioners:** Show how they can increase the overall engagement of their fan page, providing them information about the optimal social media planning strategy over time. sheds light on the causal link between these social media strategies, conversion and acquisition rates.

- **For researchers:** Extend the literature on multichannel shopping behavior by highlighting the role of different channel combinations on both behavioral and relational outcomes.
- **For practitioners:** provide insight about the most valuable combinations of channels distinguishing among different types of outcomes, and short-term and long-term results.
4. FUNDING AND INTERNATIONAL COLLABORATION

Amsterdam Business School, University of Amsterdam has agreed to co-fund the research grant with a participation of 7,000 € under the supervision of professor Umut Konus (see copy of the email received by prof. Konus in the Appendix). Prof. Konus has contributed with several papers to literature on multichannel marketing and represents an ideal partner for developing part of this research project.

In addition to co-funding the research grant, the school offers the possibility to host for short visiting period the post-doc fellow who will be selected in their Amsterdam campus.

Additional funds (3000 €) are provided by a research funding agreement that has been signed between the Department of Management of the University of Bologna and the Italian company Dorelan. This company represents a potential partner for the conduction of Field Experiments highlighted in this research proposal (see Figure 2).

5. PROFILE AND EXPECTED SCIENTIFIC OUTPUT

Profile

The following is the description of the ideal characterization of the post-doc researcher profile:

- Ph.D. in Management, Statistic or Computer Science;
- The ideal candidate should have a background in optimization, econometrics and decision sciences;
- Have developed skills in data mining, content analysis, design and implementation of surveys, experiments, and in general primary data collection.
• Have developed skills with the multivariate statistical analyses (e.g. test hypothesis, regression techniques, analysis of variance), and econometric analysis.

• Interest and previous experience in running research activities in the area of omnichannel marketing.

• Interest in spending a short visiting period in a European University for developing the research project.

Expected Scientific Output

At the end of the 2 years of the project, the post-doc fellow should provide:

• 2 papers presented in primary international marketing conferences (e.g. EMAC)

• 1 R&R in top marketing journals (ABS 4*) or 2 R&R in leading marketing journals (ABS 4).

• A final report illustrating the results of the project and a plan of the research activity that has been completed and need to be completed.

6. BIBLIOGRAPHY CITED


Brynjolfsson, E., Hu, Y. J., & Rahman, M. S. (2013). Competing in the age of omnichannel retailing. MIT.


