Communication & Media

SAMPLER

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From *The Handbook of Media and Mass Communication Theory*
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Edited by Kim A. Johnston and Maureen Taylor

WILEY Blackwell

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The Origins of Media Theory

An Alternative View

Robert S. Fortner

Given the long period of development of the media, if one takes Johannes Gutenberg's creation of movable type in 1455 as the starting point, it may seem odd that theorizing about the significance of media should not have occurred in any systematic way until the 1930s. There had been "understandings" about the press before that, of course, even philosophical claims about its role or significance going back at least as far as John Milton's *Aereopagitica* in 1644, which argued for the rescission of the British Parliament's licensing order that created official censors to approve any work for publication. And there had also been theories about the significance of persuasion to political and public life that found their roots in Aristotle's *Rhetoric*. Newspapers had appeared in the early 1600s, and by the middle of the nineteenth century they had reached mass audiences as a result of price reductions and of the development of advertising; the latter was a source of significant revenue for the populist press, which presented crime, corruption, and gore to eager readers. But there was no systematic theorizing about the significance of the press and the media, no disciplined speculation based on detailed analysis – not until radio became a mass medium and the world had fought one world war and seemed to be heading toward another as fascism and communism arose in Europe. We could reasonably ask: What took so long?

One reason – a controversial one according to the literature – is that the development of the printing press, and then of newspapers, did not in itself create a literate public. Unfortunately the evidence for the development of literacy in both Europe and the Americas is scanty at best, and the definitions of what constituted literacy are in dispute. The most common definition of literacy at the time reduced it to the ability to sign one's name; but, since people usually learned to write after they learned to read (and then only printed material, not cursive writing),

The Handbook of Media and Mass Communication Theory, First Edition.
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interpreting or extrapolating from the extant evidence is suspect. Laura Caroline Stevenson, using the evidence from "three oaths and vows taken and signed by every man in England over eighteen years of age in 1642–44," claims that "adult male literacy in these two years was a little over 30% in rural areas, with a slightly higher average in towns," although this figure fluctuated widely from one parish to another (Stevenson, 1984, p. 55). Stevenson suggests that there was a general rise in literacy among all social classes during Elizabeth I's reign, although at different rates and at different times, and that afterwards, during the reigns of James and Charles, some social groups' total literacy actually declined (Stevenson, 1984, p. 56).

> Once literacy reached a certain point, it could expand no further without a change in economic and cultural conditions; further dramatic rises in literacy did not occur until the end of the seventeenth century (when, perhaps not entirely by chance, a new kind of literature appealing to tradesmen began to appear). (Stevenson, 1984, p. 57)

In other words, necessity was the mother of literacy, as those who were learning to read (and write) did so because they needed reading in their work. Indeed James Collins and Richard Blot (2003) rightly note that only tiny groups of elites were literate up until the late nineteenth century. François Furet and Jacques Ozouf (1981, p. 215), for instance, write that the French people "were practically fully literate" a century after the French Revolution of 1789. Literacy, in their view, developed differently in different social strata: the old kingdom's elites were reading, writing, and counting by the seventeenth century, merchants, shopkeepers, artisans, tenant farmers, and rich peasants progressed to literacy in the eighteenth century, and wage laborers finally became literate in the nineteenth century (Furet & Ozouf, 1981, p. 216). Female literacy lagged significantly behind male literacy for this entire period, as most women at that time were not engaged in the public trading, contracting, and accounting of tradesmen and businessmen. They didn't "need" to be literate. David Cressy's analysis in one diocese of Norwich, England shows that, while members of the clergy and of the professions were entirely literate by 1700, 79 percent of husbandmen, 85 percent of laborers, and 89 percent of women were illiterate (Cressy, 1981, p. 108). From the extant records it appears, then, that literacy developed over a 400-year period after the invention of the printing press.

The second reason for a delay in the development of theories of the press and mass communication was that there was no "mass." This was partly due to illiteracy, to be sure, but at least three other factors were at work as well. These factors were theological, economic, and psychological. The theological issues had to do with who counted as a person. Although the Reformation had claimed that people didn't require the intervention of priests to understand scripture, as its meaning was clear to a "priesthood of all believers," the social conditions of the fifteenth century and down to the middle of the eighteenth were such that most people simply didn't count as persons. Slavery and serfdom clearly eliminated some people from consideration, as did assumptions about the rationality or intellectual capacities of women. As Bullough, Shelton, and Slavin put it (1988, p. 1), "[a]s individuals, with few exceptions, women were not counted as important." Even after the middle of the nineteenth century, these scholars explain, after the original biblical justifications for male dominance in society had been challenged, "social charter myths" were used to justify continued male supremacy. Sir Henry Maine and J. J. Bahofen "developed theories [in books published in 1861] that helped perpetuate myths about the importance of male dominance" (Bullough, Shelton, & Slavin, 1988, p. 4). One indication of the "place" of women – who constituted better than half the human race – was the late granting of the voting franchise. One argument against women's suffrage, published in 1869, outlined the differences between the sexes thus:

> The man is taller and more muscular, has a larger brain, and a longer stride in his walk. The woman is lighter and shorter, and moves more gracefully. In physical strength the man is greatly superior, and the bass in his voice and the shag on his face, and the swing and sway of his shoulders, represent a personality in him that has some attribute of thunder. But there is no look of thunder in the woman. Her skin is too finely woven, too wonderfully delicate to be the rugged housing of thunder … Glancing thus upon man, his look says, Force, Authority, Decision, Self-asserting Counsel, Victory … They are yet one species, but if they were two, they would be scarcely more unlike. (Bushnell, 1869, pp. 50–51)

There were, of course, refutations of such arguments (see, for instance, Dilke, 2011). Nevertheless, the arguments against women's suffrage held sway in the United States until 1920. As the United States considered the necessity of joining World War I, "opponents of the suffrage movement put forth the age-old argument that a woman's place was in the domestic sphere, unburdened by political matters and defined by the leadership of fathers, husbands, and brothers" – writes Katie Marsico (2011, p. 10). With 50 percent or more of a nation's population excluded from political engagement, the development of a "mass public" was constrained until such time as the nature of humanity – those with "equal rights" – grew to encompass women. Similarly, those who were slaves or, later, freed slaves were not considered part of the political landscape. Perhaps the most obvious evidence for this fact was the calculation on the basis of which a slave was defined in the US Constitution as constituting three fifths of a person for purposes of political representation.

The economic issue was simply one of disposable income, along with the costs associated with the purchase of books, newspapers, or other printed materials. Although there is ample evidence that illiterates were able to listen in on the news both in the printed press and in ephemera such as letters from abroad (see Fortner, 1978), it is still true that full participation as members of a body politic would have been enhanced by literacy – perhaps except for the fact that most people would have been unable to invest in materials to read. In England, from the onset of the Black Plague in 1349, real wages did not return to their pre-Plague levels until the 1880s (Clark, n.d., p. 2). From 1264 on, productivity remained static for nearly 500 years (Clark, n.d., p. 2). One contemporary account, written in 1884, at the end of this period, having surveyed the wages paid to various artisans, peasants, and other workers, nevertheless concludes optimistically:

> It may be well the case, and there is every reason to fear it is the case, that there is collected a population in our great towns which equals in amount the whole of those who lived in England and Wales six centuries ago; but whose condition is more destitute, whose homes are more squalid, whose means are more uncertain, whose prospects are more hopeless than those of the poorest serfs of the middle ages and the meanest drudges of the medieval cities. (Rogers, 2001, p. 185)

Only 75 years after the onset of the Industrial Revolution in England in 1775, the living conditions of those in British cities had become so bad that this country was compared to "darkest Africa": "the stony streets of London, if they could but speak, would tell of tragedies as awful, of ruin as complete, of ravishments as horrible, as if we were in Central Africa …" (Booth, 1890, p. 13). There were those, of course, who had the disposable income to invest in the media, but they were insufficient in number to actually comprise a mass audience.

Still another debilitating reality in the creation of a mass audience was psychological. This issue had to do with who counted – who possessed sufficient humanity to matter in society. The psychological reality was consonant with and strengthened by the message of theology – because theology, too, doubted that those who could not read "counted" or were in fact "countable" – as, or among, human beings. But psychological reality was also different, since the assumptions of psychology denied basic rationality to common people. Not only were they not countable now, but they might never be; they were uneducable. And it was not merely slaves or women whom the powerful saw as undeserving of education, of voting rights, or of basic freedoms. It was also peasants, serfs, children, and the poor. This was essentially the case throughout the world, where various native populations were included in the "don't count" category – Native Americans in the United States, in Canada, and throughout Central and South America. For example, it was not until the late nineteenth century, in 1897, that the Victorian Society for the Prevention of Cruelty to Children was founded in Australia – the society that began the process of transforming children from parental property into potential citizens and holders of human rights (Scott & Swain, 2002, p. xi). In the United States Abbott wrote:

> The introduction of children into our early factories was a natural consequence of the colonial attitude toward child labor, of the provisions of the early poor laws and of philanthropic efforts to prevent children from becoming a public charge, and, above all, of the Puritan belief in the virtue of industry and the sin of idleness. Industry by compulsion, if not by faith, was the gospel preached to the young as well as to the old, and quite frequently to the children of the rich as well as the poor. (Abbott, 1908, p. 15)

In England Friedrich Engels wrote in 1845:

> Child labour was a feature of the factory system from the very beginning. This was because in the early days machines were small … In early days the children were recruited from workhouses and large numbers of them were hired out as apprentices to the manufacturers for a term of years. They were housed and clothed communally and were, of course, complete slaves of their masters, by whom they were treated with the greatest indifference and barbarism. (Engels, 1968, p. 168)

Until children were accepted as something more than little adults who could be exploited in mines, factories, mills, and fields while they grew to be larger and more capable workers, it was not necessary to educate them to more than minimal standards; in this way the existence of print media was made irrelevant to many of them. Only in the early twentieth century, when compulsory education laws began to take effect in the US, did most children begin to attain sufficient levels of education to be a potential audience for the media. Although the first compulsory education law in America was adopted in Massachusetts in 1852, it was not until 1918 that all American states had such statutes (Lleras-Muney, 2001, p. 2).

As all these different reasons to differentiate people began to fall apart at the turn of the twentieth century, new fears arose among the cultural elites of the West. These fears, set in motion by the French Revolution and by other revolutions that still reverberated throughout Europe in the mid-nineteenth century, threatened the elites who controlled the world of politics, commerce, and industry; the massive empires that had been constructed by various countries; and culture itself. All these began to fear the "herd."

Concern – or fear – of *hoi polloi*, or of Jacobism, or of Napoleonism later on developed quickly in the ranks of Europe's intelligentsia after the French Revolution, which had essentially abolished feudal relations in Europe and hence had freed the serfs (see Hobsbawm, 1962, pp. 40–41). The emergence of the working class "as an independent and self-conscious force in politics in Britain and France" occurred by 1830 (p. 140). Radical movements developed, so as to represent the common people against "the restricted classes who formed the *pays légal*" (p. 157). By the end of the nineteenth century, in 1895, Gustave Le Bon wrote:

> Scarcely a century ago the traditional policy of European States and the rivalries of sovereigns were the principal factors that shaped events. The opinion of the masses scarcely counted, and most frequently indeed did not count at all. To-day it is the traditions which used to obtain in politics, and the individual tendencies and rivalries of rulers which do not count; while, on the contrary, the voice of the masses has become preponderant … The destinies of nations are elaborated at present in the heart of the masses, and no longer in the councils of princes. The entry of the popular classes into political life – that is to say, in reality, their progressive transformation into governing classes – is one of the most striking characteristics of our epoch of transition. (Le Bon, 1960, pp. 14–15)

To "conservatives and others … concerned about law and order" in the United States, this meant that there was a "danger of mob rule," and this notion "permeated social and political thinking in the decades around the beginning of the twentieth century" (Steele, 1994, p. 56). As Robert H. Wiebe concluded in his analysis, those in power in the United States "in the baldest sense … came to fear in a democratic society the people might rule" (Wiebe, 1967, p. 77). In England John Cowper Powys wrote about the herd; he referred to the British fear of the rabble, of chaos, constantly reminding his readers of who they were, so that any evil tendencies from within might be put down for the sake of preserving British culture – the "final wall," he said, "upon which one leans one's back in a god-forsaken chaos" (Powys, 1929, p. 262). This same theme was also picked up by Walter Lippmann in the United States (Lippmann, 1949, p. 34).

By the turn of the twentieth century the "yellow press" had developed – it was named after a cartoon character called "the yellow kid" – and it centered around sensationalistic accounts of crime, accidents, and corruption; muckraking had begun; and Joseph Pulitzer and William Randolph Hearst had sold millions of newspapers by whipping up war sentiments after the sinking of USS *Maine* in Havana harbor (that was the battleship that had begun the Spanish–American War). Within a few years war fever began to develop across Europe, and along with it came the development of the communication tactics destined to reach the recently important masses: propaganda. Propaganda during World War I was largely aimed at keeping at a high peak of support the spirits of the populations whose countries were engaged in the war, especially after the carnage on the battlefield began to sink in. Many – including Goebbels, Hitler, and scholars later on – credited the superiority of British propaganda with the eventual defeat of Germany and its allies (see Fortner, 1993, pp. 101–102).

Also in the first decade of the twentieth century, film moved from its humble beginnings as a novelty to becoming a full-fledged medium for storytelling. Movie theaters started to develop, and the cinema (at that time silent) was now engaging people who had been largely ignored by cultural institutions in most countries. Film was something that people could understand, something that could draw them into a story – even something that could rewrite history. *Birth of a Nation*, released in 1915, "relies on racist themes that many white Americans found quite appealing during the upheavals of industrialization and urbanization," as Conrad Pitcher noted. "Many during the early twentieth century shared the distorted view of history that prompted the negro phobia and preoccupation with racial purity found in the film" (Pitcher, 1999, p. 51; see also Franklin, 1979). Disputes arose between political liberals and moral conservatives from about 1907 forward, politicizing the film industry, which found its first major audiences among the working classes and in ethnic neighborhoods (Rosenbloom, 1987).

Immediately after the end of the war radio arrived, so to speak. The Radio Corporation of America (RCA) was created in 1919, at the instigation of the Navy Department (Fortner, 2005, p. 64), and a "radio boom" emerged by 1921 in the US, when millions of new listeners joined the crowded airwaves to hear information and entertainment from afar. Not only that but, as Robert Park put it in 1925,

> In a great city, where the population is unstable, where parents and children are employed out of the house and often in distant parts of the city, where thousands of people live side by side for years without so much as a bowing acquaintance, these primary relationships of the primary group are weakened and the moral order which rested upon them is gradually dissolved. (Park, 1925, p. 24)

By the time World War Two broke out in 1939, radio was by far the most significant mass medium.

> Never in the history of civilized life had there been a medium of communication which could transmit so much information – whether lofty or trash – to so wide an audience. In millions of radio hours, much that was genuinely cultural reached the most isolated citizen. Good music, an occasional treat for a refined urban elite, became the pleasure and inspiration of many millions in small towns … Nevertheless, advertiser control showered an unconscionable load of trash upon the American public, partly because the medium was so voracious, and partly, of course, because greed dictated entertainment that would appeal to the greatest number while offending absolutely no-one. (Marquis, 1984, pp. 410, 412)

In such an environment – new means of connecting people rapidly developing; fear of propaganda; and an atomistic population, bereft of moral anchor – reliance on traditional strategies to exert political authority or to uphold civilization seemed futile. The sale of patent medicines via the radio was a profitable business. Charlatans could woo people to radical causes. Russia had fallen to the Bolsheviks in 1917. In Europe fascists were on the move by the mid-1920s. The world was apparently unraveling, just as the means to exert control were slipping through the hands of elites and into those of recently arrived immigrants, especially Eastern European Jews (see Dresser, 1996, Jowett, 1976, Sklar, 1975).

> The arrival of large numbers of seemingly unassimilable immigrants, especially Italians and Jews, and the Homestead and Pullman strikes were interrelated developments that sparked a revival of nativism among the Anglo-Saxon elite. Despite the increasingly fragmented nature of a market society, American patricians clung tenaciously to wealth and power and resisted the erosion of their cultural authority by imposing order. As arbiters of culture, the WASP [white Anglo-Saxon Protestant] elite established the canon of legitimate theater, music, and art; validated modes of representation; and dictated audience reception that was passive in nature. (Higashi, 1990, p. 183; see also Higham, 1981)

And then came the 1930s: worldwide depression. Europe was on a war footing. Fascism and communism vied for the hearts and minds of those who would fight or support the fighters – those who became part of war machines. In the US, radical right and radical left both flooded the streets with pamphlets, newspapers, and magazines. Some, like the radical priest Charles Coughlin, took to the airwaves and started a campaign for the presidency. For instance, in Birmingham, Alabama

> Communist party organizers used [the city] as a staging area for drives among local residents and sharecroppers further south. In 1930 Communists started a newspaper, the *Southern Worker*, in Birmingham, and affiliated groups, such as the International Labor Defense (ILD), also established offices in the city. (Ingalls, 1981, p. 522)

Such activities were made possible by the changes in the way in which the notion of free speech was viewed during the 1930s.

> [A] strong right to free speech in general appealed to members of the New Deal coalition who sought protection from government oppression. These minority groups, which included immigrants, children of immigrants, Catholics, and Jews, had borne the brunt of government oppression in the early twentieth century, not only in the United States but in Europe as well. (Berman, 1994, p. 293)

In addition,

> pro-labor constituents, who made up an important sector of the New Deal coalition and included union members, Socialists, and Communists, saw a strengthened right to free speech as a means to secure the right to picket and protest management practices as well as a political tool to influence the government. (Berman, 1994, p. 293)

In other words, when the cultural and political elites considered their situation during the new century, and especially during the 1930s, they could see the significance of their commitments to order, social control, and agenda setting slipping away. Not only did new media technologies introduce the common people to knowledge and information that had previously been out of reach, and did so in a manner that made it relevant to their concerns – and note that by the 1930s the newsreel was also an important means of sharing news of the world in movie theaters; but radical groups on both the left and the right of the political spectrum were now able to use these media to pursue their own self-defined agendas regardless of the criticisms leveled at them by the "ruling classes." People's status, regardless of education, class, or social and occupational situation, had become acceptable within the larger society; education levels had increased and, along with them, literacy; people had organized and had begun to define their own interests, then to promote them through the media; and the voting franchise had been expanded, so that most people were now eligible to vote. (There were efforts in the Southern US, of course, to deny the vote to African Americans, but in terms of federal legal status this should not have happened, as passage of the 1964 Voting Rights Act eventually declared about setting the stage for the Fifteenth Amendment.)

As these realities became ever more apparent, the need to understand the real impacts of the media on the consciousness and choices of non-elites became crucial to political and social stability. Not only were these non-elites literate voting members of society by then; they also far outnumbered the cultural, economic, political, and social elites, accustomed as those were to calling the shots. Some members of these elites had a *noblesse oblige* mentality, engaging in government service or running charities as a hold-over "duty" of the Victorian Age, while others were simply used to bullying their way to greater wealth or power (e.g., in New York City's Tammany Hall). But the media seemed to have the potential to threaten the existing social order. And academics paid attention, too, to these realities. During the 1930s a group of social psychologists and sociologists combined their efforts to create an Institute for Propaganda Analysis and began publishing analytical bulletins, books, and teachers' guides (Silverstein, 1987, p. 50).

This is where the history of media and mass communication research begins and where it gets exceedingly messy. This, of course, is the typical scenario when cultural conflict occurs. In this case, cultural elites feared the herd mentality, while those who saw the new media primarily as agents of publicity – as David Sarnoff had called the radio – were eager to use them as means to tap into the herd with persuasive messages, either economic or political. Early research studies were significant in their seeming certification that the herd could be moved, and relatively easily. Two major studies – one funded by the Payne Fund, to try to determine the effects of movies on children, and the other undertaken immediately after the famous Orson Welles' *War of the Worlds* broadcast in 1938 – were qualified as "milestones" by Shearon Lowery and Melvin L. De Fleur (1983). The Payne Fund studies were conducted between 1929 and 1932. Lowery and De Fleur credit Herbert Blumer – who conducted autobiographical research to determine the influence of the movies on people – with a rich study that indicated "rather clearly that the content of the movies served as substantial influences on children" (Lowery & De Fleur, 1983, p. 40). Another study, which Blumer completed with Phillip Hauser, concluded that "motion pictures played a direct role in shaping the delinquent and criminal careers of substantial segments of those studied" (Lowery & De Fleur, 1983, p. 40). W. W. Charters (1966, p. 382), summarizing another Payne Fund study conducted by Ruth C. Peterson and L. L. Thurstone, concluded that "the outstanding contribution of the study is the establishment of the fact that the attitude of children toward a social value can be measurably changed by one exposure to a picture." He also noted that these attitude studies had "found that the effect of pictures upon attitudes is cumulative. They demonstrated the fact that two pictures are more powerful than one and three are more potent than two" (Charters, 1966, p. 383). While the overall results of the Payne Fund studies were "inconclusive about the effects of movies on American children, the best-selling popularized account of their results, Henry Forman's 1933 *Our Movie-Made Children*, asserted rather unequivocally that movies dull the discrimination and confuse the judgment of American youth" (quoted in Siomopoulos, 1999, p. 45). American intellectuals, including Lewis Mumford, John Dewey, and Walter Lippmann, all criticized the "amoral" impetus that gave rise to technological progress (Siomopoulos, 1999, p. 47). "Mumford argued that mass culture homogenises its audience not only because it disseminates stereotyped representations, but also because the mass cultural experience is passive and rationalized, much like the modern experience of work" (Siomopoulos, 1999, p. 48). So the two new technologies, radio and film, outside the control of cultural elites, and despite their potential to raise cultural standards, were to be feared.

Hadley Cantril, originally publishing a summary of the work on Orson Welles' radio program in 1938, wrote:

> on the evening of October 30, 1938, thousands of Americans became panic-stricken by a broadcast purported to describe an invasion of Martians which threatened our whole civilization. Probably never before have so many people in all walks of life and in all parts of the country become so suddenly and so intensely disturbed as they did on this night. (Cantril, 1971, p. 579)

Although these studies have been criticized for the methods they used to come to their conclusions, at the time they confirmed the fears of the cultural elites: the new media were a threat to their authority. Such studies provided a kind of scientific certainty to suspicions raised by the specter of millions falling for the fascist or the communist party lines – a phenomenon certified not only by the development of political movements in the US following such ideologies, but by the acceptance of Nazism by highly cultured German citizens. The conservative poet T. S. Eliot reminded his readers in 1939 about "the tendency of unlimited industrialism is to create bodies of men and women – of all classes – detached from tradition, alienated from religion, and susceptible to mass suggestion: in other words, a mob" (Eliot, 1982, p. 53). And Harold D. Lasswell and Dorothy Blumenstock, writing in the same year, said it was the "Age of Propaganda" (Lasswell & Blumenstock, 1939, p. 3). It did not matter that most of the propaganda seen by the public was economic in nature and that it actually provided a new conduit for those in control to influence the masses; for the public, having been drawn to this sort of propaganda, would make political propaganda "all the keener" (Lasswell & Blumenstock, 1939, p. 4). Elites might lose their control on power.

There were two realities at play here that must be acknowledged if we are to understand the genesis of mass communication research and the repudiation of the research perspectives that emerged during this period – especially as they were articulated by Elihu Katz and Paul Lazarsfeld in their *Public Opinion* of 1955. One reality was simply that the ground was shifting under the feet of societies in the 1920s and 1930s. As cultural elites were trying to grasp how their societies could embrace abhorrent ideologies and how they themselves might cope with the feared repercussions of a devastating economic depression that created potential unrest – or even revolution or war – during this period, there had to be some understandable reason. Certainly the sudden embrace of the new media by the masses was a reasonable suspect; and, as early research seemingly suggested that these media could easily sway the untutored mind, the warning seemed clear.

To give but one example, in the southern cotton-producing states a wave of strikes over working conditions, wages, and hours began in 1929.

> Local newspapers tended to be connected to traditional economic interests, such as textiles, and thus took a vehement and aggressive stance against this early wave of worker protest. Indeed, mill owners and local newspapers often worked hand in hand to sway public opinion away from strikers by appealing to anti-Communist sentiments, despite the fact that few workers had such affiliations. (Roscigno & Danaher, 2001, p. 22)

These strikes continued sporadically into the early 1930s, a large number occurring in 1934. Since the people participating in these strikes were generally poor, uneducated, and dispersed, how did they find out about this "campaign" for better treatment? It was the use of new media, in this case radio. Roscigno and Danaher (2001, p. 26) argue that this new medium altered the leverage and autonomy of the subgroup of textile workers. New radio stations established in the South

> had the unintended consequence of creating a relatively autonomous community of musicians, many of which were ex-mill workers, who traveled from mill town to mill town and radio station to radio station. This group alone, we suggest, represented an important conduit for information flow among mill towns … By disseminating information geographically, media can mold the political perceptions of a dispersed population. This was the case with radio and its establishment in the US South.

Through his fireside chats, President Franklin Roosevelt indicated a national commitment "to the plight of workers and workers' right to collectively organize … despite local elite repression" (Roscigno & Danaher, 2001, p. 26).

The second reality was the very myth of the technologies used by these media. They could capture motion and sound; they could carry both sound and picture through the air (the first experiments with TV occurred already in 1927). For radio, writes Alice Marquis, "the years before 1929 were the Era of Wonderment: sound – any sound – emerging from a box seemed like a miracle" (Marquis, 1984, p. 412). These technologies (the motion picture and the radio waves) might not only conquer time and space but carry within them the seeds of destruction for civilization itself. Their impact must be understood before it was too late. The political and economic elites could see the potential for the "magic" of these technologies to be turned against their interests.

There were four types of research pursued within this cultural conflict: propaganda analysis (Harold Lasswell), public opinion research (Walter Lippmann), psychological research (the Payne fund studies), and marketing research (Paul Lazarsfeld) (Robinson, 2006, pp. 76–77).

There was, in other words, a cultural predilection to believe what eventually became known as the "magic bullet theory" of communication effects. The assumed existence of such a "bullet" did fit into the cultural assumptions of those in power: a bullet in the wrong hands might do irreparable harm. It did not matter that the research that underlay the development of this powerful effects model was often anecdotal, based on a remembered past, or difficult to replicate, because it matched the belief system that was part and parcel of the culture. Traditional culture and religion had been abandoned by large swaths of people who were in desperate circumstances and were looking for a new creed that could explain their situation and show them the way forward. Those who defended the old ways feared that their place in the culture would be usurped. Both groups, for different reasons, wanted to believe that these new technologies were powerful. Those outside the cultural elite wanted power to adhere to their use of the media. Those inside the elite groups wanted to know exactly what they were dealing with, so they could take steps to control the potential chaos. And steps were taken to control the new media, beginning in the early 1920s, with radio conferences. These were followed by the 1927 Radio Act and by the 1934 Communications Act in the United States – steps that were, in their own way, also enacted in many other countries (see Fortner, 2005). On the film side, where cinema was the prime focus of entertainment expenditure (Sedgwick & Pokorny, 2005, p. 79), there were the efforts to control content and to reduce the influence of immorality –both on the screen and in personal lives. This resulted in the creation of cinema production codes in 1930 and 1934, and eventually in the rating system for films that is still in place today. In 1935 film admissions in the US amounted to 2.233 billon. Americans "made 18 visits per caput [*sic*] to motion picture theatres, paying 25 cents per visit" (Sedgwick & Pokorny, 2005, p. 82).

Jefferson Pooley's examination of the repudiation of this early research by Katz and Lazarsfeld in the post-war period says that their

> well-written, fifteen-page synopsis of the "ideas with which mass media research began" ascribes to past scholarship one of "two opposite inclinations": the interwar body of work either decried the mass media as "instruments of evil design" or else heralded those media as a "new dawn for democracy" ([Katz and Lazarsfeld], pp. 15–17). Both approaches – the fearful and the ebullient – described the media message as a "direct and powerful stimulus" ([Katz and Lazarsfeld], p. 16). Swept up by popular alarm or blinded by utopian rhetoric, both groups of scholars based their judgments on intuition or folk wisdom or speculative European theory. None of this will do, write Katz and Lazarsfeld. (Pooley, 2006, p. 131)

The subsequent history of the development of media theory is well known. It moved away from the original "powerful effects," "hypodermic needle" assumptions of its earliest days to a more limited effects model; then to a two-step flow model, with the inclusion of opinion leaders; then to a multistep flow model; and then to an explosion of perspectives – critical and cultural studies, audience studies, media ecology studies, cultural imperialism, content flow, and interpretation studies, among many others. This research broadened the issues of concern, abandoning the fear that had driven the earlier wave, and settled in as a more scientific study of effects, as people reacted to the messages of the media both as consumers and audiences. What we can learn from these early days, however, is how integral elites or powerful interests are to the types of research that develop to study the media. It is not merely the replacement of one paradigm by another, which seems more powerful or more elegant à la Thomas Kuhn, that drives scholarly understandings forward. It is also the need to respond to the society – to its assumptions, fears, and strivings – that can give birth to a new means of understanding the media within that society: how it is used, by whom, and for what ends. As American society has become ever more politicized (we might say ideologized) from the 1980s on, elite groups have become more conscious of the need to control the message. But the difficulty of actually accomplishing this goal, while hindering its achievement, has led both to efforts to redefine the media debate to the advantage of one ideological party or another, and to research aimed at determining the "bias" implicit in media content. This is merely a continuation of the issues of the 1930s, although it is written in a different hand. In other words, media theorizing has never escaped, and perhaps cannot escape, its history – or its connection with the culture that surrounds it.

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14

Social Media and Civic Engagement

Learning Objectives

After reading this chapter, you should be able to:

1 Understand the historical shifts of civic engagement.
2 Apply civic engagement to the concept of the individual self.
3 Identify the influence of social media on political communication.

Introduction

Effective and regular communication with physicians is just one step towards a positive and healthy lifestyle. Chapter 13 explained how social media helps increase the frequency of health communication and aids positive personal health management. However, there is much more to happy citizens than achieving good health. Research demonstrates how an increase in civic engagement and volunteering leads to better physical and mental health (Lum and Lightfoot, 2005; Batista & Cruz-Ledón, 2013). *Civic engagement*, or membership in formal community groups and participation in social activities (Shah, 1998), is an easy way to bolster your own sense of belonging and accomplishment within a culture. Chapter 3 demonstrated the importance of communities in our lives. People feel better about themselves whenever they are making a positive impact on society. Social media technologies make it is easier than ever for individuals to get involved in organizations and join causes that they care about.

Strategic Social Media: From Marketing to Social Change, First Edition. L. Meghan Mahoney and Tang Tang.

The benefits of civic engagement do not stop at individual needs. Social connectedness leads to better schools, faster economic development, lower crime rates, and more effective government in society (Putnam, 1995). The greatest advantage of becoming a civically engaged citizen is that you are able to help others while also helping yourself. Chapter 13 urged you to consider strengthening health communication between physicians and patients at the community level for better self-care. The remaining chapters in this section encourage you to consider individualized behavior change to positively influence the lives of a larger community. Small steps can make a big difference to others.

Remember from Chapter 3 our discussion of why community is so important to the behavior change process? Humans actively seek communities, whether they are based on proximity, mutual interests, health concerns, or family. These social networks play the strongest role in how we behave and construct the world around us. The building blocks of community – membership, shared emotional connection, influence, and needs fulfillment (McMillan & Chavis, 1986) – allow individuals to share in an identity and engage in dialogue with members (Campbell & Jovchelovitch, 2000). Many of these dimensions have now shifted, and are being fulfilled in the virtual realm. Social media provides resources for maximizing our own personal identity, as well as our collective identity.

Collective identity is a social psychological concept that helps to explain the human need to be part of a larger group, especially when tackling larger social issues. With a strong collective identity, movements are able to garner more support and power because individuals feel as though they are all working towards common goals. There is more power in larger groups. As long as the larger group has clearly defined objectives, opponents, and an integrated sense of being that is incorporated into the movement ideologies, they can become a strong force in society (McCaughey & Ayer, 2003). In a world with unlimited information at your fingertips, it has become nearly impossible to live in isolation from the world around you. It is only natural to find community with others who share in your vision.

Traditional top-down diffusion media made it easy to receive information and messages. Many utilized this opportunity to share crisis information from around the globe. You may remember hearing calls for individuals to send in money to help feed a child in a different part of the world. But what if you did not have any expendable income? Does that mean that you were unable to help the cause? Often, the solutions offered were based on predetermined objectives and targeted towards a mass audience. Social media allows individuals to seek out information, engage in dialogue, and come up with collective solutions and action plans that work best within their lifestyle. Perhaps a group of similarly minded individuals are able to put their resources together to help coordinate a fundraiser or event.

Social media makes it easier than ever to make a positive difference in the world. Technology has connected the world on a smaller, more tightly bound scale. Stiglitz (2002) explains how *globalization* has integrated the countries and people of the world through an increase in transportation and communication. This has resulted in a breakdown of barriers between the flow of goods, services and knowledge across borders. Think of your own social network: you have likely been able to stay in touch with individuals from many parts of your life that you otherwise would have lost touch with if not for social media. Maybe you have friends that you met from a summer camp, a study trip abroad, or even just a random night out with friends long ago. These connections are difficult to maintain without regular contact, and social media allows the opportunity with little effort from either party. Our sense of connection and network has completely transformed.

The purpose of this chapter is to explore the influence of social media on the nature and shape of civic engagement, and how it proves different from any other era. There is much ongoing debate in the field of communication about whether technologies are eroding our sense of civic responsibility (Stoll, 1995; Putnam, 2000; Dahlgren, 2009) or making it easier to get involved in our communities (Lévy, 1997; Rheingold, 2008). In order to better answer these questions, this chapter explores the historical trends of civic engagement, the influence of civic engagement on individuals, and the impact technology has on political communication and behavior change.

Historical Shifts of Civic Engagement

It would prove impossible to generalize levels of civic engagement across the world throughout history. While one country may experience record high levels, others may be in the process of disengaging. Civic engagement is a complex and dynamic process. While we often associate high levels of civic engagement as a positive phenomenon, spikes in levels may actually indicate problems within a culture, rather than a fluid functioning society.

In Chapter 4 we discussed one of the largest instances of collective action and civic engagement for social change, the Egyptian Revolution of 2011. Social media played an intricate role in connecting and organizing individuals beyond their own individual social networks to urge Mubarak to resign. We have discussed the many benefits of a civically engaged society, but lower levels of activism may actually indicate complacency with the status quo. How do you keep citizens from staying involved when they are happy with the way things are going?

In America alone there have been many changes over time in the extent and purpose for which individuals got involved in their community (Figure 14.1). In the 1950s, civic engagement was high, especially through union membership, volunteering at schools and religious organizations following World World II. In the 1960s this engagement shifted towards public demonstrations against oppression and gender rights, signifying an increase in citizens' sense of empowerment and dissatisfaction with government. This generation produced the National Organization of Women, Peace Corps, and Martin Luther King's "I Have a Dream" speech. The 1970s continued these fights, as well as protests against the Vietnam War and a greater awareness for environmental green initiatives. The 1980s were characterized as the "Me decade" due to low levels of individual volunteering at the community level. Parents were not as involved in local parent–teacher associations or the Red Cross. However, LGBT rights and healthcare reform were huge issues in the fight against the HIV/AIDS epidemic. In the 1990s, youth were seen as apathetic and irony-obsessed slackers. The 1992 Presidential election was the first time in twenty years that demonstrated an increase in youth voting, partly due to MTV's "Rock the Vote" campaign. There was also an increase in nonprofit organizations, anti-sweatshop labor movements, and peace building work. The millennium drastically changed how individuals communicate with one another through social media platforms. Social media has emerged as a primary tool for

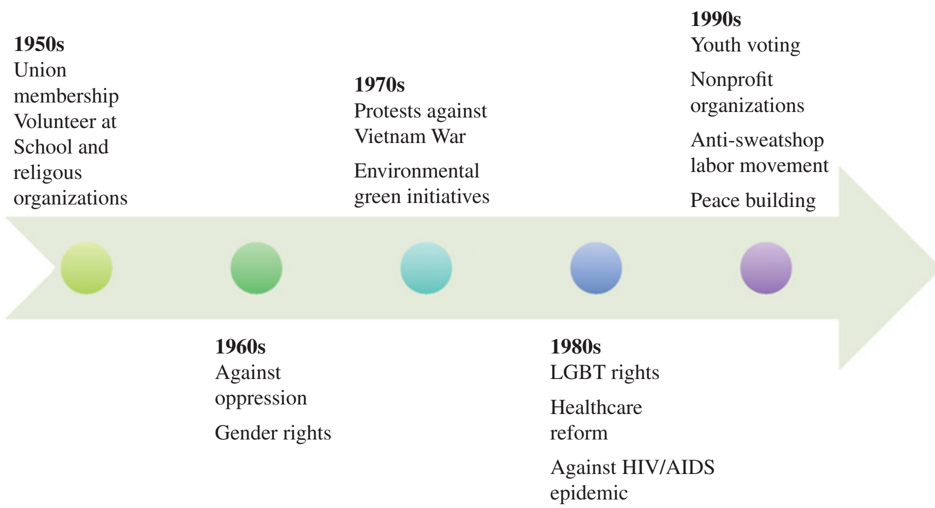

Figure 14.1 Civic engagement timeline. Source: Author.

communicating with personal communities, political organizing, and aiding disaster relief efforts. Since 2010, young people are being seen as more socially, politically and civically engaged than ever before, especially with regard to human and LGBT rights in America (Koenig, 2013).

This timeline demonstrates just one country's flux in civic engagement levels. Here, you can see how complex and interconnected involvement is with issues of freedom, politics, public health, and technology. Every society, culture and subculture has their own dynamic process for when levels increase and decrease. There are also many different types of civic engagement, making it difficult to monitor and evaluate as a whole.

Researchers suggest that one of the most difficult problems facing Western democracy today is the decline in citizens' political engagement (Dahlgren, 2009; Shah, 1998). They worry is that the industrial and information revolution has led to the decline of community due to the weakening of private community, including contact with neighbors and friends; the decline of public community, such as voluntary organizations and civic concerns; and disengagement from community, including the willingness to contribute to the well-being of the community (Quan-Haase *et al.*, 2002). Many believe that technology is making individuals more and more individualistic and less concerned about how their behaviors impact the group.

There are many reasons for this decline in community, including increased television watching, more women in the workplace, increased mobility of families, and changing dynamics (Shah, 1998). People criticize technology for playing a role in this process because it takes people away from their in-person communities and replaces it with virtual ones (Stoll, 1995). However, these virtual communities could be utilized as public spaces to discuss cultural issues and mobilize civic action.

In Chapter 3, we discussed Putnam's (2000) book *Bowling Alone*. This text portrayed today's generation as having the lowest trends of civic engagement and social capital in history, illustrating how there are higher instances of bowling, but fewer leagues than ever in our nation's history. Putnam (2000) believes that electronic entertainment is the cause of decreased civic engagement due to its ability to transform people into a society of watchers rather than doers. Other researchers believe that the information era proves a positive and significant predictor of individual social capital and civic and political participatory behaviors, online and offline (Gil de Zúñiga *et al.*, 2012). They demonstrate how the Internet is being incorporated into the routine practices of everyday life, including social capital.

While our levels of civic engagement may not have changed significantly, they are definitely becoming augmented and more geographically dispersed (Quan-Haase *et al.*, 2002). The Internet is providing new ways of engaging in community and the finding of information (Lévy, 1997). This process is more genuine, because it allows us to interact with others without our voices, faces and bodies serving as a distraction to our message (McCaughey & Ayer, 2003). Here, audiences are active information-seekers and are driving the engagement process, rather than being forced to participate in something that is not as relevant to their gratifications and needs.

Quan-Haase *et al.* (2002) explain how individuals who spend more time online value the Internet for its positive social virtues and use it as a space for collective interactions. This purpose is a complementary and alternative way to find community in addition to those available offline. Our personal causes and interest in engagement are closely linked to personality and preferences. The Internet allows us the ability to seek out those activities that sound most appealing, even if they are not directly in our own community.

Regardless of the influence new technologies have on levels of civic engagement, it is safe to say that they are not going anywhere. Younger generations are increasingly using social media to express themselves, explore their identities and connect with peers as active creators and consumers of culture (Rheingold, 2008). New technologies are transforming civic engagement. Today, you are able to share information just as quickly with your next-door neighbor as you are with individuals across the globe. Social media makes civic participation easy and free and increases the types of advocacy efforts with which they are able to engage (McAllister, 2013).

The appeal of civic engagement through social media has much to do with the many benefits of participatory media discussed in Chapter 4. It allows users the ability to control conversation through blogs, wikis, RSS, tagging, social bookmarking, music/photo/video sharing, mashups, podcasts, digital storytelling, virtual communities, social network services, virtual environments, and videoblogs (Rheingold, 2008). Just as in the marketing realm, participatory media leads to more educated, empowered and motivated citizens (Boulos & Wheeler, 2006). There is something more inherently satisfying about deciding that you want to make a change and organizing action to do so than to be told what to do by someone in a position of higher power.

Technology is the future of civic engagement. While previous generations may have had to physically travel to Congress to march on the front lawn in order to protest, today's Internet users are able to voice concerns from their living room. The challenge becomes making their voice heard when everyone else is doing the same thing. Thus, let's now explore the potential of social media and the impact involvement has on voicing the individual self.

Civic Engagement and the Individual Self

Mass media has traditionally been used to voice public sphere issues. Chapter 3 discussed key differences between private and public sphere issues of communication. Private sphere involves issues such as family, relationship, goals, values, and health. Public sphere topics include issues of civic activity, news, politics, weather, and sports. Habermas (1992) imagined the public sphere as a place for citizens to engage the political process through critical and rational deliberation. This was the space for civic engagement. Media has traditionally been an outlet for the public sphere; a place to go when you are interested in consuming "water cooler talk." Think of television and radio as the replacement for individuals standing in the middle of crowded streets screaming to the masses on a soapbox. Today, social media has transformed this public space into a convergence of both private and public forms. The blurring sphere has interesting implications when it comes to civic engagement.

The importance of our personal social network cannot be understated. Putnam (1993) describes the function and social elements of network, norms and trust of our private sphere as our social capital. *Social capital* enables citizens to work together more effectively to resolve collective action problems. Social capital is also a public good because it benefits such a wider community than just the self. There is power in numbers and individuals are able to accomplish more if they are part of a larger group with tangible goals.

You may have heard the saying that "It is not what you know, but who you know." Perhaps you were encouraged to take more internship opportunities in college with hopes that the experience and relationships formed would lead to your first job out of college. We like to believe that we live in a society where with enough hard work anyone can achieve anything. However, the truth is that a larger social structure has much to do with who succeeds and who does not.

Your social capital of where you live and who you know helps to define who you are and thus to determine your fate (Putnam, 1993). For centuries, social groups were bound by proxemics to make connections and had to rely on local social capital. Many minority groups lack connections that allow them to get their feet in the door of the workforce. Nonetheless, social media today is able to minimize these inconsistencies, though not equalize them, by allowing individuals to connect through mutual causes, interests and collective actions. Social media is the new face of community engagement and allows anyone to communicate directly with decision-makers (McAllister, 2013).

Social capital is seen as one of the most vital ingredients to economic development around the world. Each individual must find his or her own voice, or unique style of personal expression that distinguishes one's communication from those of another (Rheingold, 2008). Once you are able to identify your voice, you are better able to engage with society as a citizen, moving from a private to a public voice. When aggregated with dialogue of the voices of other individuals, your voice becomes *public opinion*.

Remember from Chapter 3 the importance of authenticity, or recognizing and harnessing what you uniquely bring to the table. The same is true of your public voice. It should encompass your experiences, identity construction and confirmation. What if someone were to give you $100 to donate to any organization or cause of your choice? Where would you choose to donate? Perhaps you have received a scholarship that allowed you to attend college. You know how important this was in your own life, so you choose to donate your money to a similar scholarship fund. Maybe your family has a history of breast cancer and so you choose to donate the money towards a cancer research organization. Animal lovers may choose to donate the money to their local animal shelter or the World Wildlife Fund.

We decide what issues are important to us based on our own lived experiences. If someone were to give you that money 100 years ago, chances are you would not have donated to the same organization. Without new media, you may not have known about that scholarship or ever even heard of the World Wildlife Fund. You were bound by the experiences of your local community. Most likely, the money would have gone to a local church or nonprofit organization within your own community, within walking distance from your home.

Today, you receive millions of messages from all over the world about causes, concerns and organizations that need help. Some of these organizations are consistent with your own values and life experiences, but most of them are not. The only way to truly make a difference and find your authentic voice is to seek a community that shares in your values and passions. When utilizing social media to choose a civic engagement platform, it is important to have a strong action plan in place.

Civic Engagement Action Plan

1 Determine your own passions and values. What makes you excited about becoming civically engaged?
2 Seek out organizations that share in this vision. Don't become distracted by all of the other "virtual noise."
3 Research the authenticity and transparency of various organizations working towards this cause.
4 Determine whether you are able to make a tangible difference and mobilize for the organization, or whether you are just involved to improve your own virtual identity.
5 Spread awareness through your own social capital and network to recruit strong mobilized advocates with the same goals.

There is no reason to get involved with every organization or cause that asks you to connect through social media. We prefer that our online identity be associated with positive organizations and nonprofits. There is something appealing about having your social network see that you are connected with the local animal shelter. However, if you secretly have no interest in pets or animals, you should not feel pressured to connect with an organization just because it is a good cause. Their initiatives may be someone else's cause; you should only connect with those organizations that share in your voice and values.

When it comes to online activism, significant money and resources can be invested into social media with little return. Without a strong voice and little authenticity, efforts may result in "*slacktivism*" or half-hearted online activity that has no real effect on real-life outcomes (Morozov, 2009). One reason that this phenomenon may be so common is because social media makes it so easy to virtually connect. With just a click of a mouse an individual can say that they would like to receive more information and updates about an organization, even if they have no real interest in the mission. You may feel bad about turning down an organization that is trying to establish safe mining conditions and fair wages for diamond miners all over the world. It is okay to say no and be happy that someone else is interested in fighting for that cause. That person is just not you.

Research indicates that 57% of Facebook users connect with a charity on Facebook because they want to publicly display their support for the nonprofit (Mansfield, 2013). They want their friends to positively associate them with good causes. However, 43% of Facebook users "unlike" a charity on Facebook because they feel as though that charity posts messages too frequently. This means that individuals do not actually want to receive information and updates from the charity that they chose to connect with. Before agreeing to connect with a nonprofit organization, ask yourself if you really have the passion or energy to get involved. Otherwise, you are not really doing the nonprofit or yourself any favors.

What happens when you connect with a cause or organization that you feel as though shares in your voice and interests? Perhaps it is the same charity you decided would receive your $100 donation. You have decided that you want to increase your own life and the lives around you, and have actively sought out a connection with the charity of your choice. However, you may not actually have the expendable money to donate. Maybe the charity is too far away to actively volunteer and get involved with, or maybe you just do not have the time right now. Is connecting through social media really going to make a difference?

One problem with virtual civic engagement is that you may actually feel as though you are helping without doing anything for the cause. While this satisfies the natural human desire to help others, not much is done towards the mission objectives of the organization (Morozov, 2009), which is especially true with organizations that only ask social media users to connect or "like" them on social media.

Thus it is important for you to make an active effort to do more than just connect with the organization. Be a participatory user. Share your opinions and contribute your voice to the ongoing discussions. Even if there is little you can do financially or through volunteer work, you are contributing to the organization's public opinion and that is a huge step towards becoming a campaign advocate. Spread awareness through your own social capital and network. It's a great first step towards becoming actively involved, even if most of your tangible participation is in the future.

If you are in charge of communication for a nonprofit or charity organization, be sure that you are not spending all your efforts towards gaining social media numbers. While it is important to spread awareness about your organization's efforts, you do not want to be connected with hundreds of users who do not want to receive your messages and do not share in your voice. A few highly participatory and active connections will do more for your cause than if everyone on Facebook was passively connected. Also, remember to give those users who do want to participate clear and tangible direction. This should include monetary contributions, volunteering opportunities, and active dialogue centered around core issues in the area. Such tangible direction will allow everyone the ability to participate in areas that they feel comfortable with given their personal circumstances.

This section illustrates how to successfully connect causes with individual voice and passion. These recommendations will result in relationships that endure across a lifetime of advocacy. However, some acts of civic engagement require one-time real-life mobilization efforts. The field of political communication has explored how to prompt citizens to not only support a candidate's platform, but what it takes to transform that support into real-life votes on election day.

Technology and Political Communication

While civic participation includes activities such as volunteering for charities, attending political rallies, and forwarding online messages for social action, researchers generally equate participation with electoral activity (Gil de Zúñiga *et al.*, 2012). Everyone has her or his own feelings about democratic elections. Many are excited to participate in the privilege of voting. Others begrudgingly deal with the onslaught of political advertisement campaigns in the months leading in. Yet others remain apathetic to the entire process.

American rhetoric teaches children that voting is the duty of citizenry (Jones & Hudson, 2000). However, with over $6 billion spent on campaign advertisements, only 57.2% of eligible voters participated in the 2012 American Presidential election (Gans, 2012). Much research has been carried out into increasing these numbers and prompting voters, particularly first-time voters, to engage in the electoral process.

Voter turnout and decision-making over the past three decades has been a dynamic and complicated field of research study. Social media has drastically changed the way we receive and disseminate political news. Today's Americans are the first generation who grew into voting age with unlimited information (and misinformation) at their fingertips. It is their right and freedom to express their cultures, beliefs, views, and values. Social media provides a public sphere for everyday citizens to debate and engage dialogue with their own social network (Burgess *et al.*, 2006).

Political discussion is difficult, and some people feel as though there is no place for it on social media. Some may advise you that it is best not to discuss alcohol use, religion or politics on social networking sites. While there is some truth to these recommendations, especially with regard to alcohol use, this section argues that healthy public dialogue is essential to an informed citizenry.

Before engaging a political discussion on an online forum, be sure that you take extra efforts to demonstrate that you are contributing to the conversation in a respectful manner. Tell others when you agree with them, and if you do not, point out that you respect where they are coming from and then explain why your life experience has made you feel differently. Encourage them to share their opinion, because you should want to hear more. Even if you are not interested in changing your opinion, it helps to understand why other people feel differently from you. If you are not interested in hearing what others say, chances are you are not in a place to contribute to the discussion.

Social media has become the space where young adults go to read and share political information. The Internet has developed into a key political information source, as the percentage of Americans who obtained political information online between 1996 and 2008 rose from 4 to 40% (Kushin & Yamamoto, 2010). Just as television changed the election process by allowing voters to see candidates rather than simply hear them through radio, social media has been the most politically significant technological innovation of the twentieth century (Hong & Nadler, 2012), by providing candidates the opportunity to talk directly to voters and, more importantly, by granting voters access to talk directly with candidates. This holds great opportunity for creating a culture of openness, transparency and more egalitarian relationships.

President Barack Obama has been lauded for being one of the first politicians to successfully incorporate social media into his 2008 Presidential campaign. He successfully harnessed 13 million individuals on his email list, 3 million on his text messaging programs, and 5 million connections on more than 15 social networking sites. In addition, 8.5 million people visited his website (MyBarackObama.com) monthly, and 3 million personal phone calls were placed in the last four days of the campaign (Lutz, 2009). This multiplatform social media strategy mobilized people to utilize grassroots measures to spread campaign messages, campaigns and materials to their individual networks and transformed support into money and tangible votes.

While many candidates before Barack Obama also utilized social media in their campaigns, they were not as successful at transforming online connections into message advocacy. As we discussed with regard to social media marketing, sending messages on social media platforms does not mean that the information process is participatory.

Despite the success of Barack Obama's campaign, many politicians continue to use the social media outlets in the same top-down manner as traditional media platforms. Few politicians use their accounts to engage or answer voters. In fact, it was not until Father's Day 2011 that President Barack Obama (@BarackObama) actually sent a tweet himself (Thomson, 2012). In 2015, Obama opened his own Twitter account (@POTUS) and was able to directly communicate with Internet audiences, leading him to break social media records. He was the fastest user to reach 1 million followers, hitting the milestone in under five hours (Molina, 2015). While social media allows users to individually engage politicians, few are capitalizing on the opportunity. Instead, politicians are relying on users to engage their friends and social network about their support for individual candidates and platforms.

One reason politicians may not be eager to utilize social media in a participatory manner is due to the control–participation balance that we discussed in Chapter 3. In order to allow users to participate, a politician must give up some control over what appears on his or her social media site. It does not matter what President Barack Obama posts on his official Facebook account, users will respond in both positive and inflammatory ways. For instance, on Sunday, July 28, 2013, the President's Facebook page (Facebook.com/BarackObama) posted a picture of children petting their family Portugese Water Dog, Bo, stating that he is always a "Crowd pleaser." While this is not a very politically divisive message, users commented on the picture to express their dissatisfaction with high gas prices, Cambodian election results, immigration reform, and federal budget cuts. Politicians have the option of leaving the comment function open and allowing these comments to appear, or to turn off the comment function and have more control over what appears on their site. Most choose not to censor their audience completely, but do not respond to them either.

In addition to understanding how politicians are communicating with voters through social media, one of the most interesting takeaways of current voter research is the influence social media has on voter turnout. In one research study, a message was posted on various Facebook pages for users who were at least 18 years of age in the United States on Election Day, November 2, 2010. Users who received this message were shown a statement on top of their news feed that encouraged them to vote, providing a link to a local polling place and a clickable button where they could self-report that "I voted." This message would then be shared with their social network and displayed a counter of other users that had reported voting, including the names and faces of those that they know. Another group of Facebook users received the voting information, but were not shown the names and faces of friends. A third group received no message on their timeline.

Results from the study demonstrate that users who received the message with the names and faces of friends from their social network were significantly more likely to vote than users who received no message at all. Turnout among individuals who received the diffusion-only message, with no names or images from social network, proved identical to those with no message at all. This demonstrates the ineffectiveness of information-only appeals (Bond *et al.*, 2012). Community proved the significant game changer for voting behaviors.

Based on what we know about behavior change research, it makes sense that individuals would be influenced to follow through with a requested behavior change if they know that their social network is also participating. Humans model the behaviors of those who they identify with around them. Moreover, we seek community, and believe that issues that are important to our friends and family have importance to us as well.

Now we understand the importance that our private sphere relationships have on our political attitudes, a public sphere topic. Social media is the only media platform, thus far, that is able to converge these two spheres to encourage active voter participation. Each election cycle we learn more about what works and what does not. However, it is important that human behavior change theory is not forgotten as new technologies emerge. Humans want to participate and share with their network. It is important to investigate how other types of organizations encourage users to do so through social media.

This chapter has explored the process of civic engagement and the influence technology has had on individual willingness to participate, sense of self, and political engagement. Social media plays an increasingly critical role in how individuals find community and mobilize efforts into collective action. In this chapter, we discuss the importance of finding your personal voice and seeking causes and organizations that share in your passions and interests. However, some campaigns are hoping to raise awareness about issues that are invisible to the general public. The nongovernmental organization Invisible Children Inc. aimed to accomplish just that through the "Stop Kony" movement.

Case Study: *Kony 2012*

Kony 2012 is a 30-minute video that informs audiences about the horrific behavior of Joseph Kony, leader of the Ugandan group the Lord's Resistance Army that promotes guerilla warfare, including the use of abducted children as soldiers (Chatterjee, 2012). The video includes interviews with children who use personal narrative techniques to increase awareness about the terrible things that Kony was forcing them to do. Jason Russell, the film's director and overarching voice to the film's narrative, explains how he personally got involved in this campaign to capture Kony after meeting and becoming friends with Jacob, one of Kony's victims (Goodman & Preston, 2012). This story provided the film with much-needed authenticity, as it was clear to audiences that Russell was personally vested in and cared for the charity's mission.

Beyond a call to capture Kony, the film also asked for individuals to participate in a "Cover the Night" event on April 20, 2012. The event asked people to form teams with their interpersonal network and register on their campaign website, Kony2012.com. The video instantly went viral. It gained over 40 million views on YouTube and more than 13 million views on Vimeo. People were sharing the video on Twitter through the hashtag #kony2012. Celebrities tweeted their support of the campaign, including Oprah Winfrey, Ryan Seacrest, Kim Kardashian, and Justin Beiber (Goodman & Preston, 2012). Over 3.5 million pledges were registered on the "Cover the Night" website to participate in the event (Thomson, 2012). The campaign spread around the world, especially in North America, Europe, and Australia (Carroll, 2012).

One of the greatest successes of the viral spread of *Kony 2012* was its ability to connect individuals from around the world with the lives and citizens of Uganda. The video urged individuals to share the video's message with their social network, donate money, wear campaign paraphernalia, and attend the "Cover the Night" event, all in hope of raising awareness about the cause. It told a larger story of globalization and hope, urging younger generations to push back against the mainstream media and redefine culture (Thomson, 2012).

The social media campaign also urged audiences through the immediacy message "Nothing is more powerful than an idea whose time is now" (Kony, 2012). Individuals were able to brand themselves with the cause by selling action kits, which included shirts, wristbands and stickers. The purpose of these action kits was to use paraphernalia in spreading awareness with registered "Cover the Night" teams on April 20, 2012. On this day, cities were to be covered in event posters and stickers and rallies across the world.

However, weeks leading into the "Cover the Night" event, as the video became more and more popular, many media outlets began investigating Invisible Children Foundation, since the website had little transparency for the efforts and funds from the campaign. Criticisms and backlash began hitting social media outlets.

A 19-year-old college student from Nova Scotia created a blog on Tumblr called "Visible Children" and broke Invisible Children's charitable spending practices, citing that only 32% of campaign funds actually go towards the cause (Goodman & Preston, 2012). The government and citizens of Uganda made public statements resisting the video as well, stating that they felt that the video was over-dramatized and generalized the situation (Thomson, 2012). The oversimplified statement that Invisible Children used to appeal to everyone and get users engaged was the very same message that turned users away weeks later.

Additionally, Jason Russell, the director and voice of the campaign, was detained in San Diego after incoherently yelling and disrupting traffic in his underwear about a month before the "Cover the Night" event (Huffington Post, 2012). This prompted Invisible Children to post a public message on their website that reads:

> Jason Russell was unfortunately hospitalized yesterday suffering from exhaustion, dehydration, and malnutrition. He is now receiving medical care and is focused on getting better. The past two weeks have taken a severe emotional toll on all of us, Jason especially, and that toll manifested itself in an unfortunate incident yesterday. Jason's passion and his work have done so much to help so many, and we are devastated to see him dealing with this personal health issue. We will always love and support Jason, and we ask that you give his entire family privacy during this difficult time.

These events left Invisible Children in the midst of a public relations crisis. The movement's "Cover the Night" event, which urged registered teams around the world to blanket cities with *Kony 2012* paraphernalia fell short (Carroll, 2012). When the day arrived for registered teams to show their support and mobilize action in cities, the momentum of the movement had already passed.

There are many lessons we can learn from the *Kony 2012* campaign. The first is the potential global virality of a social media campaign with no formal advertising. If a campaign is able to tell a strong narrative, and emotionally appeal to users, the story will spread. The potential of spreading awareness through individual social networks is huge.

However, while the authenticity of Jason Russell's concern for the *Kony 2012* movement was evident, the campaign lacked tangible direction with its mobilization efforts. It is easy for users to go online and pledge to mobilize themselves, but in this case the mobilization being asked during the "Cover the Night" event was just additional awareness about the campaign. People were happy to spread and share the message with their personal networks, which led to a global awareness campaign unprecedented in history. Nonetheless, it led advocates to question how much awareness was enough. At some point, campaigns must move beyond awareness and demonstrate tangible outcomes from all of the supporters' efforts.

As discussed in Chapter 2, equally as important as message authenticity is clear transparency of campaign goals and monetary funds. Donors felt duped when they discovered that only 32% of campaign funds were going towards the cause. Information about where funds were going and the impact they were making should have been available on the Invisible Children website. This would have increased the amount of trust and loyalty advocates had with the campaign.

Finally, and perhaps most importantly, the Invisible Children campaign was tied to the voice of its director, Jason Russell. While this was essential to the initial awareness stages of the movement, it never moved on towards a participatory advocacy. Once Russell found himself in the middle of the public relations crisis, the movement was not able to rebrand itself away from his image or voice.

It would have been better if the campaign had asked smaller mobilization actions from users. It then could have used social media to allow others to contribute to the narrative and share their stories about the campaign. Russell's voice was powerful and made a huge impact on awareness. However, in order to translate into a successful mobilization campaign, others must also contribute to the dialogue and form a collective public opinion to help shape the movement.

Discussion questions

1 How did social media make it easier to spread the *Kony 2012* video? Why was the content of the message something that so many Internet users felt inclined to spread to their social network?
2 What are some possible reasons why the *Kony 2012* movement did not result in tangible social change outcomes? What could future social change campaigns do differently to mobilize audiences into action?
3 What role did narratives play in the spread of the *Kony 2012* movement? How could the movement have had less of Jason Russell's narrative, and more from its audiences?

Summary

This chapter illustrates the influence and impact of social media on civic engagement. While we are still not certain whether this change is inherently good or bad, we do know that it is here to stay and holds great potential for breaking some traditional power structures, such as the oppression of minority networks and the relationship between political candidates and citizens.

We have learned that levels of civic engagement are constantly in flux, and today's digital climate allows us the opportunity to find causes and goals that match our own voice, experiences and passions. The opportunity for connecting with individuals around the world is unprecedented, and it is important to capitalize on the many benefits of getting involved.

Social media has changed the way individuals make decisions about their community, the world, and the people in charge. The tools and function of social media make it possible to engage everyday citizens with political candidates. People's expectations of the political process have thus changed, as the community has grown beyond proximity boundaries and the issues and people we care about are bigger than ever before.

Social media is undoubtedly a game changer in the civic engagement arena. The technology is designed to allow society and groups within it to interact for their own needs and objectives. With enough virality, an invisible social media campaign can transform into public opinion. Nonetheless, while social media opportunity means great things for social change, it takes transparent and authentic voice as well as organized mobilization.

In order to maximize the amount of possible social change, people must feel as though they have control over their content. Social media brings opportunities for individuals to express their opinions, join causes, and interweave the private world of family and friends with their public interests (Valenzuela, 2013). The field of communication for development also believes that social media can be used for positive social change. Let's now explore this area in greater detail, and explain how to best incorporate media into development initiatives in Chapter 15.

Key Takeaways

1 Civic engagement allows individuals to meet in community groups and participate in social activities, leading to better health, sense of belonging, accomplishment, economic development, and more effective government within a society.
2 Globalization has integrated people around the world by breaking down many traditional barriers and transforming civic engagement to more augmented and geographically dispersed initiatives.
3 Groups with tangible goals and a clear voice are able to accomplish more than individuals alone. As individual voices become aggregated, they come together to form public opinion.
4 There is a danger that online activism has little authenticity and no real effect on real-life outcomes. It is important to seek out civic engagement that speaks to your experiences and passions, because half-hearted engagement may satisfy your desire to help others with little impact on society.
5 The Internet has become a key source for political information and significantly changed the election process by granting candidates and citizens the opportunity to communicate with greater openness and transparency, though few are using it to its full potential.
6 Social media campaigns should move beyond the awareness stage of advocacy, and encourage supporters to share in the narrative.

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31

Consumer Engagement in the Digital Era
Its Nature, Drivers, and Outcomes

Wolfgang Weitzl and Sabine Einwiller

Introduction

Since the 1990s a considerable research stream has emerged that mirrors substantial academic interest in understanding various forms of consumers' relational behaviors with brands (e.g., Aaker, Kumar, & Day, 2004). Research on the consumer–brand relationship paradigm has focused on traditional consumer-based concepts such as trust and commitment (e.g., Bansal, Irving, & Taylor, 2004; Palmatier, Dant, Grewal, & Evans, 2006; Verhoef, 2003), perceived service quality (e.g., Zeithaml, Berry, & Parasuraman, 1996), brand experience (e.g., Brakus, Schmitt, & Zarantonello, 2009), consumer–brand relationships (e.g., Fournier, 1998), consumer identification (e.g., Ahearne, Bhattacharya, & Gruen, 2005), and brand involvement (e.g., Coulter, Price, & Feick, 2003). With the emergence of new digital technologies, particularly social media, consumer–brand interactions are, however, changing. Consumer–brand interactions are increasingly governed by relational rules that are different from earlier consumer market conditions (Brodie, Ilic, Juric, & Hollebeek, 2013; Sashi, 2012). Consumers' role is changing from being passive recipients of marketing signals to acting as proactive participants in interactive, value-generating (and sometimes destructive) cocreation processes (Sawhney, Verona, & Prandelli, 2005; Vargo & Lusch, 2004). To take these changes into account, scholarly research is shifting its focus from traditional concepts to theoretical perspectives and empirical approaches that are deemed to better explain these current phenomena.

In this context, *consumer engagement* (CE) has emerged as a prominent concept among academics (e.g., Dwivedi, 2015; Hollebeek, Glynn, & Brodie, 2014; van Doorn *et al.*, 2010) and practitioners (Haven, Bernoff, & Glass, 2007) alike. In the literature, traditional constructs focusing on past consumer experiences (such as customer satisfaction or perceived quality) are often considered inadequate to predict and explain today's consumer behaviors. In search of an alternative, CE is here typically portrayed as an important variable for creating, building, and enhancing relationships with consumers (Brodie *et al.*, 2013). Practitioners consider CE as a driver of sales growth (Neff, 2007) and profitability (Voyles, 2007). The rationale underlying these assertions is that engaged consumers are seen as important value creators for the company that possess, among others, a key role in viral marketing activities by providing referrals and recommendations for products, services, and/or brands to others. Accordingly, companies have launched numerous CE campaigns in the past. The British clothing company *Burberry*, for

The Handbook of Communication Engagement, First Edition. Edited by Kim A. Johnston and Maureen Taylor.

instance, has created its own website where customers can upload and comment on pictures of people wearing the company's products. Following the launch of the site that aimed to increase customer participation and involvement, Burberry's online sales surged 50% year-over-year (Siu, 2015).

The importance of CE that works in favor of the company is also echoed by academic literature, where the concept is viewed as a key driver of product innovation processes (Hoyer, Chandy, Dorotic, Krafft, & Singh, 2010) and experience as well as value cocreation (Brakus *et al.*, 2009; Prahalad & Ramaswamy, 2004). Similarly, CE is viewed as an important predictor of essential individual-level outcomes such as customer brand loyalty (van Doorn *et al.*, 2010) and a facilitator of purchase decisions (Patterson, Yu, & DeRuyter, 2006). CE has been found to influence relational consequences including customer commitment, brand trust, and customer's affective brand attachment (Brodie *et al.*, 2013). Marketing scholars generally expect the CE concept to generate promising insights into current, dynamic consumer phenomena that go beyond contributions made by traditional consumer-based concepts (e.g., Brodie & Hollebeek, 2011). Recent academic research has generated valuable insights that enhance our understanding of CE as an important trigger to engender positive outcomes (e.g., brand support) but also negative outcomes (e.g., brand boycotts) of consumer–brand relationships for consumers, companies, and other market participants.

The aim of this chapter is to provide a literature review of the current state of marketing and consumer research in the area of CE. After discussing the nature and characteristics of the concept, we show that this literature stream provides a number of alternative but sometimes divergent conceptualizations and definitions of CE. Importantly, we demonstrate that the various perspectives offer several commonalities. We synthesize the engagement literature in order to derive a holistic understanding of the complex and multifaceted CE phenomenon. The synthesis results in a theoretical framework that integrates insights from the literature on the construct, including its scope and relationship to its drivers, as well as the conditions and outcomes of positively as well as negatively valenced CE.

The Nature of Consumer Engagement

The term "engagement" can be traced back to the seventeenth century, when it was commonly used to describe a variety of notions, like expressing a certain kind of moral or legal obligation, tie of duty or an employment (Oxford Dictionary, 2009). More recently the term is being associated with the notions of connection, attachment, emotional involvement, and/or participation (London, Downey, & Mace, 2007). On a generic level, the concept of engagement is understood as a form of social, interactive behavior occurring as a transient state within a broader engagement process developing over time (e.g., Huo, Binning, & Molina, 2010).

Within the last two decades the term has been used extensively in a variety of academic disciplines including psychology, sociology, political science, communication, and organizational behavior (e.g., Resnick, 2001; Saks, 2006). This interdisciplinary recognition led to a variety of theoretical approaches highlighting different aspects of the concept (Hollebeek, 2011a) and the introduction of diverse subforms of engagement, such as "employee engagement" (Crawford, LePine, & Rich, 2010), "stakeholder engagement" (Greenwood, 2007), "media engagement" (Calder & Malthouse, 2008) and "dialogic engagement" (Taylor & Kent, 2014).

The recognition of the concept's importance for consumer–brand relationships emerged quite recently: Prior to 2005 very few academic articles discussed concepts like "consumer engagement," "customer engagement" and "brand engagement." Although these terms have been used increasingly since then, only a few marketing and consumer behavior scholars attempted to provide systematic conceptualizations of CE to date. The compilation of definitions summarized in Table 31.1 shows that the understandings vary regarding the concept's scope, components,

Table 31.1 Consumer engagement definitions

Author(s)	*Definition*
Algesheimer *et al.* (2005)	The consumer's intrinsic motivation to interact and cooperate with community members.
Baldus, Voorhees, and Calantone (2015)	The compelling, intrinsic motivations to continue interacting with an online brand community.
Bowden (2009)	A psychological process that leads to consumer loyalty to the service brand.
Brodie, Hollebeek, Juric, and Ilic (2011)	A psychological state, which occurs by virtue of interactive customer experiences with a focal agent/object within specific service relationships.
Brodie *et al.* (2013)	A multidimensional concept comprising cognitive, emotional, and/or behavioral dimensions, (which) plays a central role in the process of relational exchange where other relational concepts are engagement antecedents and/or consequences in iterative engagement processes with the brand community.
Calder, Malthouse, and Schaedel (2009)	A second-order construct manifested in various types of first-order "experience" constructs, with experience being defined as "a consumer's beliefs about how a (web)site fits into his/her life."
Chan, Zheng, Cheung, Lee, and Lee (2014)	The level of a person's cognitive, emotional, and behavioral presence in brand interactions with an online community.
Higgins and Scholer (2009)	A state of being involved, occupied, fully absorbed or engrossed (i.e., sustained attention), generating the consequences of a particular attraction or repulsion force. The more engaged individuals are to approach or repel a target, the more value is added to or subtracted from it.
Hollebeek (2011a)	The level of a customer's motivational, brand-related, and context-dependent state of mind characterized by specific levels of cognitive, emotional, and behavioral activity in brand interactions.
Hollebeek (2011b)	A customer's level of cognitive, emotional, and behavioral investment in specific brand interactions.
Hollebeek *et al.* (2014)	A consumer's positively valenced cognitive, emotional, and behavioral brand-related activity during or related to specific consumer/brand interactions.
Mollen and Wilson (2010)	The cognitive and affective commitment to an active relationship with the brand as personified by the website or other computer-mediated entities designed to communicate brand value.
O'Brien and Toms (2010)	A psychological process that leads to the formulation of loyalty.
Patterson *et al.* (2006)	The level of a customer's physical, cognitive, and emotional presence in their relationship with a service organization.
Sprott, Czellar, and Spangenberg (2009)	Individual difference representing consumers' propensity to include important brands as part of how they view themselves.
Van Doorn *et al.* (2010)	The customer's behavioral manifestation toward the brand or firm, beyond purchase, resulting from motivational drivers.
Vivek, Beatty, and Morgan (2012)	The intensity of an individual's participation and connection with the organization's offerings and activities initiated by either the customer or the organization.
Webster and Ahuja (2006)	A subset of flow and a more passive state representing the extent of pleasure and involvement in an activity.

and boundaries. However, our review shows that these definitions also share some notable commonalities. We highlight the core understandings and key commonalities discussed in the CE literature in order to derive an integrative framework of the concept as follows. In this context, CE serves as the umbrella term for concepts that reflect a highly similar conceptual scope—despite the employment of different terms (Hollebeek *et al.*, 2014). In our discussion, we regard CE as an interactive, relational, mental, and behavioral exchange between a specific brand (i.e., engagement *object*) and an individual consumer (i.e., engagement *subject*), who can be a former, current or potential customer but also a critic of the brand.

The interactive and experiential nature of consumer engagement

Central to the CE concept is its interactive, experiential nature, which is inherent in consumer–brand relationships (Brodie *et al.*, 2011). Basically, CE represents the connection that consumers form with a specific brand based on their interactive, personal experiences with it. Numerous scholars see interactivity as CE's conceptual foundation. Consumers are not only "consumers of the brand experience" but also its cocreators, as discussed in the relationship marketing (e.g., Vivek *et al.*, 2012) and particularly in the service-dominant (S-D) logic, which are two fundamental concepts in marketing literature. In essence, both concepts stress the importance of enduring interactions and value-generating relationships among consumers and brands. The S-D logic focuses on what Vargo and Lusch (2008) entitle "transcending view of relationships," which acknowledges that consumer behavior is centered on customers' and/or other stakeholders' interactive experiences taking place in complex, cocreative environments. More specifically, it emphasizes the importance of consumers' proactive contributions in cocreating their personalized brand experiences and the perceived value provided by the company through active, explicit, and ongoing dialogue and interactions (Vargo & Lusch, 2004). Drawing on this literature, CE at its core reflects the dynamics of interconnected agents (companies and consumers) which jointly produce interactively generated, cocreated experiences and values for the brand's stakeholders (Vargo, Maglio, & Akaka, 2008).

The internet provides the ideal channel for building interactive relationships and including consumers in the creation of experience and value (Sashi, 2012). The "web" not only allows companies to share and exchange information with their current and prospective customers; it also helps consumers to connect with a vast global community of geographically dispersed individuals to exchange positive and negative consumption experiences. Consumers can get access to an arsenal of different online interaction and communication instruments such as discussion forums, micro blogging sites like *Twitter,* bulletin boards, chat rooms, blogs, newsgroups, social bookmarking sites, video sites like *YouTube,* and social networking sites like *Facebook, MySpace,* and *LinkedIn*. In the S-D logic, consumers are thought to make proactive contributions to brand interactions (Vargo & Lusch, 2008), and may devote relevant cognitive emotional and/or physical resources to this activity, based on the perceived value they obtain from the brand interaction (Higgins & Scholer, 2009).

Cocreation occurs when customers participate through spontaneous, discretionary behaviors that uniquely customize the consumer–brand experience (Lusch, 2006). On online platforms, consumers discuss products and opinions, evaluate and recommend brands, and provide new product ideas or feedback (Hennig-Thurau *et al.*, 2010; Seraj, 2012). Consumers use these platforms to employ and express themselves in interactions with the brand and with its existing and potential customers. And companies make use of their customers' desire to get involved in the brands' creation (e.g., its meaning). For example, Heineken introduced the "Reinvent the Draught Beer Experience" challenge in 2012, which gave customers the opportunity to share videos, images, and ideas to help enhance the brand experience. Customers were very receptive to the campaign, submitting hundreds of ideas, assisting Heineken to improve its product while generating deep-seated involvement and brand interest at the same time. On the other hand, online platforms for intercustomer communication also provide the opportunity for consumers to use this publicly visible space to voice and share criticism and complaints that are visible to millions of others (van Doorn *et al.*, 2010).

An extreme form of criticism manifests itself in the creation of antibrand communities (e.g., Krishnamurthy & Kucuk, 2009). In the digital era, consumer activists can get involved in vivid online communities to easily share their antipathy for a specific brand (e.g., sprawl-busters.com against Walmart) or consumption in general with others. All these interactive, cocreative customer experiences can be interpreted as the act of engaging (Lusch & Vargo, 2010). Recognizing the crucial role of interactivity and consumer experience for the CE concept, we formulate our first proposition:

Proposition 1 CE is determined by a consumer's interactive experiences with a specific brand and produces interactive experiences for the consumer him-/herself and for others.

Behavioral and psychological components of consumer engagement

The different definitions of CE reveal a broad understanding regarding two main components of the concept: behavioral and psychological. While some definitions comprise both components, some stress one or the other. We will first outline the behavioral and psychological views separately, before turning to the comprehensive perspectives that integrate both components.

Scholars focusing on specific CE behaviors define the concept primarily with reference to specific types and/or patterns of engagement activities (Pham & Avnet, 2009). According to van Doorn *et al.* (2010, p. 254), CE manifests itself in "behaviors that go beyond simple transactions and may be specifically defined as a customer's brand focus, beyond purchase, resulting from motivational drivers." The authors assume that, in essence, CE is manifested through an eagerness to participate in consumer–brand processes which is expressed in specific actions. Scholars supporting this view describe CE as a relatively new concept that integrates a multitude of nontransactional behaviors, including customer retention, referral or word-of-mouth (WOM) activities, actively supporting other customers, and cocreation (e.g., Verhoef, Reinartz, & Krafft, 2010). Such behaviors are regularly shown offline as well as online and concern the brand itself or directly related objects (e.g., brand communities), when consumers exhibit loyalty (e.g., Rosenbaum & Massiah, 2007), share their opinions, feelings, and thoughts with others (e.g., Hennig-Thurau, Gwinner, Walsh, & Gremler, 2004), assist other customers with their shopping (e.g., Verhagen, Nauta, & Feldberg, 2013), or help the company to improve their products and services.

These behaviors have in common that they are all voluntary (Mollen & Wilson, 2010). They can be related to Hirschman's (1970) classic model of exit, voice, and loyalty. According to which, consumers may choose to exercise "voice" (i.e., communication behaviors aimed at expressing their experiences) or "exit" (i.e., behaviors that curtail or expand the individual's relationship with a specific brand). A key assertion is that the consumer's attitudinal relationship with or commitment to the brand (i.e., loyalty) influences an individual's choice between the two behaviors. This choice is made on a continuum ranging from pure voice (e.g., positive or negative WOM, complaint behavior) to pure exit (e.g., decrease consumption, switching to another service provider), with many behaviors in between. Specifically, some behaviors—like participation in online brand communities, blogging or voluntarily voicing design improvements for a product—may be a signal for both voice and exit (or nonexit through relationship strengthening) (van Doorn *et al.*, 2010). All these brand-related behaviors can be summarized as *behavioral CE*.

The second school of thought focuses on psychological manifestations of CE. Calder and Malthouse (2008, p. 5), for example, define engagement as "the sum of the motivational experiences consumers have." These authors explicitly refer to the motivational nature of CE (see also Brodie & Hollebeek, 2011 among others). In a similar vein, the concept of "brand community engagement" has been defined as "the consumer's intrinsic motivation to interact and cooperate with community members" (Algesheimer, Dholakia, & Herrmann, 2005, p. 21). All these authors adopt an organizational or social psychological perspective of CE where engagement is typically regarded as a motivational construct (Salanova, Agut, & Peiró, 2005). Thus, *psychological CE* encompasses key mental states and processes embedded in consumer–brand connections (Brodie *et al.*, 2011).

There is substantial evidence that a motivational psychological state brings about behavioral engagement (e.g., Vries & Carlson, 2014), implying the coexistence and interrelation of behavioral and psychological CE. In fact, it is well understood that behavioral CE results from motivational drivers in the consumer's psyche (van Doorn *et al.*, 2010). Thus, psychological and behavioral CE together reflect the type and strength of the mental and behavioral relationship the consumer has with a specific brand. Understanding CE as a combination of behavioral and psychological components allows us to holistically investigate consumers' personal differences and capture multiple facets of individual engagement—mentally and behaviorally—observed at a focal level at a given point in time under a single framework. Considering the aforementioned, we state the following:

Proposition 2 (a) CE consists of psychological and behavioral engagement components. (b) Behavioral CE includes specific interactive, brand-related behaviors shown at a specific point in time. (c) Psychological CE is a motivational state expressed by specific attitudes reflecting the type of consumer–brand relationship.

The most comprehensive definitions of psychological CE acknowledge the coexistence of cognitive, emotional, and intentional dimensions together (e.g., Vivek *et al.*, 2012). Such an understanding typically draws on the literature developed in related disciplines (e.g., social psychology) and reflects the three-component view of attitude. For example, Hollebeek *et al.* (2014) propose a three-dimensional view, including (a) cognitive processing: a consumer's level of brand-related thought, processing, and elaboration in a particular consumer–brand interaction representing the cognitive CE dimension, (b) affection: a consumer's degree of positive brand-related affect in a particular consumer–brand interaction mirroring the emotional side of CE, and (c) activation: a consumer's desired level of energy, effort, and time spent on a brand representing the intentional CE dimension. Today, the three-component perspective of psychological CE (i.e., cognitive, emotional, and intentional [often termed behavioral] dimensions) is widely cited in marketing literature (e.g., Brodie *et al.*, 2011), although the specific expressions of these generic dimensions may vary. To illustrate, the cognitive dimension of CE (i.e., consumers' cognitive investment in consumer–brand relationships) is expressed in Mollen and Wilson's (2010) as well as Hollebeek *et al.*'s (2014) "cognitive processing." In addition, the cognitive aspect of CE is also emphasized in Higgins and Scholer's (2009) "attention" and Hollebeek's (2011a) "immersion" concept. The second CE dimension, which is here described as emotional CE or, more precisely, the consumers' affective investment in consumer–brand relationships can also be found in earlier research contributions under differing names. For example, Calder *et al.*'s (2009) "intrinsic enjoyment," Vivek *et al.*'s (2012) "enthusiasm," Hollebeek *et al.*'s (2014) "affection," Dwivedi's (2015) "dedication" and Hollebeek's (2011a) "passion" concept all cover similar psychological aspects. Finally, the intentional CE dimension (i.e., consumers' intentions to engage in specific forms of consumer–brand interactions) is represented by Patterson *et al.*'s (2006) "vigor" and is also reflected by Hollebeek's (2011a) "activation" concept. This leads to the third proposition which is in line with the current state of literature:

Proposition 3 Psychological CE comprises cognitive, affective, and intentional elements.

Intensity levels of consumer engagement

There is considerable consensus that varying engagement levels exist. For instance, Vivek *et al.* (2012, p. 127) define CE as "the intensity of an individual's participation in and connection with an organization's offering and/or organizational activities, which either the customer or the organization initiate." Similarly, Hollebeek (2011b, p. 55) regards "consumer brand engagement" as "the level of a consumer's cognitive, emotional and behavioral investment in specific brand interactions." This indicates that consumers apply a certain level of effort or intensity when they engage with the brand. Further, literature provides profound support for regarding CE as an individual, context- and situation-dependent concept, which can be observed at different levels of intensity and/or complexity at different points in time (e.g., de Villiers, 2015). Scholars argue that the rationale underlying this basic assertion lies in the necessary existence of specific interactive experiences between the CE subject and the focal object within specific situational conditions (May, Gilson, & Harter, 2004).

The different levels of CE are considered to range from "low" to "high" (Shevlin, 2007) or from "actively disengaged" to "fully engaged" (Bryson & Hand, 2007). In search of a more precise typology of intensity levels, Brodie *et al.* (2011) propose that the relative importance of the cognitive, emotional, and behavioral CE dimensions may vary with the specific set of situational contingencies, thus permitting different levels of CE intensity and/or complexity to emerge (see also de Villiers, 2015). CE levels are influenced by specific situational, contextual, and individual-level factors, including personality, mood, and the individual skills of the consumer (e.g., Brodie *et al.*, 2011). A "nonengaged" state arises when the consumer is unaware or ignorant of the brand and its offerings (i.e., unengaged consumers), after the termination of the relationship and in a period of CE dormancy where CE is temporarily inactive during a particular consumer–brand relationship (i.e., disengaged consumers). In contrast, "engaged consumers" can choose from a very broad spectrum of mental and behavioral CE expressions, ranging from very active forms (e.g., personally recommending the brand) to more passive forms of CE (e.g., collecting information about the brand on social media) or purely mental states of readiness. In sum, this leads us to the fourth proposition:

Proposition 4 (a) CE is characterized by a specific intensity level at a given point in time. (b) CE intensity levels are highly context-dependent.

Valence of consumer engagement

Apart from adopting different levels of intensity, psychological, and behavioral, CE can also be differently valenced, ranging from strongly positive to strongly negative. Initially, marketing literature had a strong focus on positive CE (e.g., Brodie & Hollebeek, 2011), which includes all those actions and mental states that have positive consequences—be they financial or nonfinancial—for the company in the short or long run. This literature stream profoundly demonstrates that positive CE can be beneficial for brands and companies (Brodie *et al.*, 2013; Christodoulides, Jevons, & Bonhomme, 2012; Wang, Yu, & Wei, 2012). However, only a few authors have emphasized the duality of CE when considering its valence. Brady, Voorhees, Cronin, and Bourdeau (2006) were among the first to state that CE can be classified from the company's perspective as either positive or negative. Higgins and Scholer (2009) also recognize the existence of not only positive manifestations (e.g., bonding) but also of negative expressions of CE (e.g., dissociating from an object). Others seem to be aware of the duality, but choose to focus on positive CE (Dwivedi, 2015; Hollebeek *et al.*, 2014). Hollebeek *et al.* (2014, p. 151), for example, explicitly define consumer brand engagement as "a consumer's positively valenced [...] brand-related activity during, or related to, specific consumer/brand interactions."

Recently, a number of studies have highlighted negative CE in various contexts (Leventhal, Hollebeek, & Chen, 2014; van Doorn *et al.*, 2010)—of a mental or behavioral nature. Concerning the latter, a number of themes emerged in the literature, including actions and activities (e.g., negative WOM, publicly complaining online) resulting in negative impact either for the brand (e.g., reputation, economic welfare) or the individual consumer's personal well-being. Research shows that negative behavioral CE is generally, but not always, more influential than positive engagement (i.e., the "negativity effect") (e.g., Xue & Zhou, 2010). Thus, when the behavioral component of CE is negatively valenced the affected brand can be seriously damaged (e.g., Chakravarty, Liu, & Mazumdar, 2010; van Noort & Willemsen, 2012; Ward & Ostrom, 2006).

Detrimental effects are particularly likely in the case of active negative behavior, which includes a consumer's expression of discontent directly to others in order to hurt the brand and/or its owner. Hennig-Thurau *et al.* (2004) noted that the opportunity to express dissatisfaction and showing negatively valenced feelings toward a company or brand are important drivers for consumers' participation in online communities. Still harmful, but not as seriously, is consumers' passive negative behavior, such as not repurchasing the product, refusing the collection of more loyalty points or allowing the collected rewards to expire. It may also include consuming content on an antibrand community or following another consumer sharing negative comments about the brand on *Facebook* (de Villiers, 2015). CE behaviors of negative valence shall be termed *avoidance behaviors*, while any forms of behavior expressing a positive connection with the brand are referred to as *approach behaviors*. This leads us to the following literature-based proposition:

Proposition 5 The valence of CE can be positive or negative.

Temporal aspects of consumer engagement

Various authors emphasize the dynamic nature of CE when regarding the concept merely as a process, in contrast to a single event. For instance, Hollebeek (2013) claims that when regarding CE as a process, which reflects a series of aggregated states, engagement can be modeled over time. The transient engagement states occur within broader, dynamic iterative engagement processes (Bowden, 2009), which implies that a certain engagement state arrives not in isolation but merely as the product of prior CE and/or its outcomes (e.g., customer satisfaction). If customers are, for example, successful (unsuccessful) with their CE efforts (e.g., formulating an online complaint on a company's brand page), immediate post-CE brand satisfaction (or dissatisfaction) will increase. This affects pre-CE satisfaction of the subsequent CE state which ultimately changes CE over time (van Doorn *et al.*, 2010). Hence, we state the following proposition:

Proposition 6 (a) CE states occur within broader, dynamic, and iterative engagement processes. (b) The iterative nature of the consumer engagement process implies that specific relational consequences of CE may act as antecedents in subsequent engagement cycles.

Conceptual Framework of Consumer Engagement

Propositions 1–6 form the core of our CE conceptual framework (Figure 31.1). By integrating the different perspectives discussed in the marketing-based CE literature, it captures the holistic nature of the CE concept. Our framework draws on earlier conceptual models, including the theoretical work of van Doorn *et al.* (2010) as well as Brodie *et al.* (2011), and also recognizes recent empirical findings supporting the proposed relationships. It conceives CE as a multidimensional construct consisting of cognitive, emotional, intentional, and behavioral dimensions (e.g., Brodie *et al.*, 2011), as well as the multifaceted expressions of the construct. Specifically, it

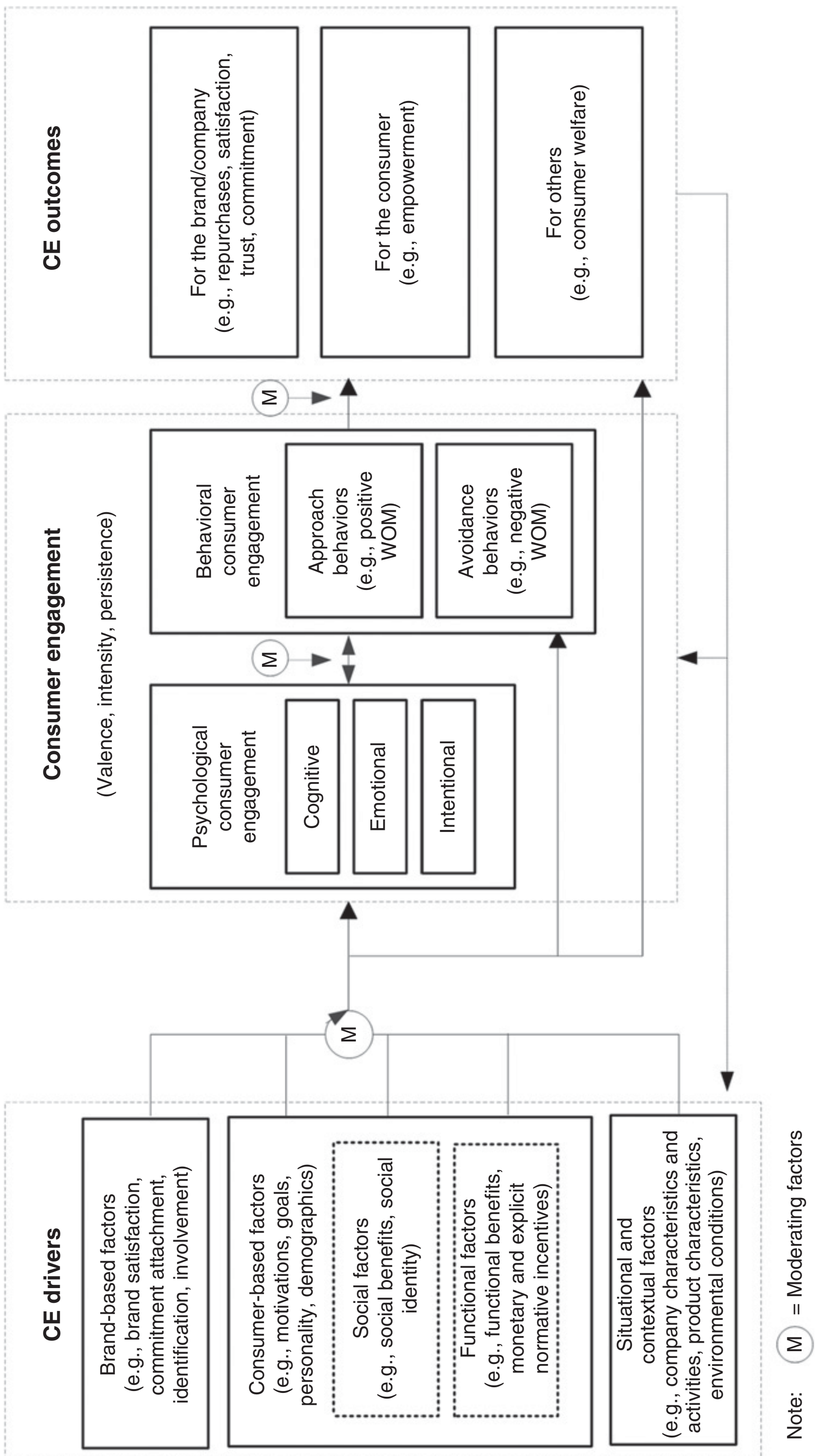

Figure 31.1 Consumer engagement conceptual framework.

highlights valence (i.e., the direction of CE), intensity (i.e., the form and modality of CE), and persistence (i.e., the CE's scope—temporary vs. ongoing) as three important CE expressions (de Villiers, 2015). The relative importance of the concept's different dimensions is subject to varying situation-, context-, and/or consumer-specific contingencies, thus generating distinct CE complexity levels. The complete framework shows that CE is embedded within a broader network of other relational variables. Thereby, it also differentiates CE from other relational concepts. More specifically, the framework claims that the interactive, experience-based aspects of CE differentiate it from constructs such as brand attitude and involvement (see Hollebeek, 2011a for a more detailed discussion). It further shows that specific CE levels are determined by specific interactions between the consumer, the engagement object (the brand), and other stakeholders, moderated by contextual conditions.

The CE construct, which stands in the center of the framework, is framed by the CE drivers/antecedents and the CE outcomes. It is important to note that the framework is not linear, which enhances its complexity. The different drivers can interact with each other and thus enhance or inhibit the impact of a particular factor on CE. Furthermore, recognizing the iterative nature of the CE process, several of CE's relational outcomes may subsequently act as CE drivers (Brodie *et al.*, 2011). For instance, trust can function as a CE consequence for new customers, while being a CE antecedent for existing customers (Bowden, 2009; van Doorn *et al.*, 2010). Researchers suggest similar patterns for other constructs, such as consumer commitment (e.g., Bowden, 2009; Saks, 2006) and customer satisfaction (e.g., van Doorn *et al.*, 2010), while other constructs (e.g., involvement, participation) seem to be CE drivers or outcomes (e.g., loyalty) only. Conscious that certain variables can function on different levels of the model, we will first discuss the role of CE drivers, before outlining the outcomes of CE.

Drivers of consumer engagement

Regarding CE drivers, three factors can be differentiated: (a) *brand-based*, (b) *consumer-based*, and (c) *situational and contextual factors*. Many of these factors directly affect CE. However, in line with van Doorn *et al.* (2010) and the current state of literature, we also expect that these factors can interact and thus enhance or inhibit each other's impact on CE.

Brand-based factors

Literature suggests that the most important factors driving CE are attitudinal variables regarding the relationship between the consumer and the brand itself, here summarized as brand-based factors. The variables include, but are not limited to, customer satisfaction (Anderson & Mittal, 2000; Palmatier *et al.*, 2006), brand commitment (Garbarino & Johnson, 1999), trust (de Matos & Rossi, 2008), brand attachment (Schau, Muñiz, & Arnould, 2009), brand identification (Kuenzel & Vaux Halliday, 2008), brand reputation and equity (Walsh, Mitchell, Jackson, & Beatty, 2009), and brand performance perceptions (Mittal, Kumar, & Tsiros, 1999). High or low intensity levels of these variables drive (positive/negative) CE, while intermediate levels have no influence.

Customer *satisfaction* is one of the most frequently discussed antecedents (e.g., Cambra-Fierro, Melero-Polo, & Vázquez-Carrasco, 2014; Cheung, Shen, Lee, & Chan, 2015). CE is often considered to be a satisfaction-driven construct, implying that customer satisfaction is a fundamental prerequisite (Brodie *et al.*, 2011; Sashi, 2012; van Doorn *et al.*, 2010). Sashi (2012) adds that, while satisfaction is a necessary condition for CE, it is not sufficient alone. He argues that satisfaction with consumer–brand interactions during a purchase process may precede or result from the purchase, but dissatisfaction (i.e., a state of cognitive/affective discomfort) can arise at any stage and disrupt the process. Marketing scholars differentiate this transaction-specific satisfaction from cumulative customer satisfaction (Oliver, 1993), which is typically regarded as a better predictor of enduring relationships and repurchases. Cumulative or overall customer satisfaction can be defined as "an overall evaluation based on the total purchase and consumption experiences with a good or service over time" (Anderson, Fornell, & Lehmann, 1994, p. 54). The highest form of customer satisfaction is achieved when a person's expectations are exceeded and his/her emotions become highly positive. This state of extremely positive experience is sometimes termed "consumer delight" (Oliver, 1997), which may motivate consumers to engage in positive WOM or even set up a brand community (van Doorn *et al*., 2010).

In contrast, consumers' *dissatisfaction* and resulting affective states toward the brand, such as anger, regret, and disgust (Garg, Inman, & Mittal, 2005), can lead to negative CE. Consumers for example post complaints on the internet to warn others of a bad product or to call on them to boycott the company (Einwiller & Steilen, 2015; Ward & Ostrom, 2006). The extent of dissatisfaction and other individual and situational factors determine on which platform consumers voice their dissatisfaction. For instance, online complaint forums provide consumers with a platform to possibly resolve the problem with the help of the company or forum members. Antibrand sites (Krishnamurthy & Kucuk, 2009) give dissatisfied and alienated consumers the opportunity to vent and construct a negative brand identity.

Another intensively discussed CE antecedent is *brand identification*. Bagozzi and Dholakia (2006, p. 46) define the concept as "the extent to which the consumer sees his or her own self-image as overlapping with the brand's image." This can be used to construct the self, as a reference point for distinguishing oneself from nonbrand users, as well as to present the concept of self to others (Escalas & Bettman, 2005). Consequently, the idea of brand identification suggests that consumers who feel highly identified with the brand tend to engage in pro-brand mental states and activities. In contrast, individuals who are strongly identified with a competitor brand or feel disidentified are more likely to show negative CE toward the focal brand. Further brand-based factors include *earlier brand experiences* (Lau & Lee, 1999), *relationship length* (Dwivedi, 2015), and consumer *participation* (Vivek *et al*., 2012).

Consumer-based factors

Consumer-based factors include a diverse set of variables that motivate individuals to engage with a brand, or deter them from doing so. In relational exchanges, consumers typically have specific consumption *goals*, such as maximizing a transaction's functional benefits (e.g., purchasing a good product at a reasonable price) or maximizing social benefits (e.g., getting involved with other customers or members of a brand community). Often, these goals determine how the brand is used and how the consumer consequently engages with the brand. For instance, in their research on company-hosted online communities, Wiertz and de Ruyter (2007) conclude that the highest-contributing community members engage predominantly for social reasons, driven by commitment to the community. Similarly, Mathwick, Wiertz, and de Ruyter (2008) demonstrate the importance of voluntarism, reciprocity, and social trust for CE levels in a consumer problem-solving context. *Social factors* such as (brand) community commitment (Kim, Sung, & Kang, 2014; Raïes, Mühlbacher, & Gavard-Perret, 2015) and community trust (Ridings, Gefen, & Arinze, 2002) can be valuable sources of active and passive CE.

CE may also be driven by *functional factors*, for example because the consumer wants to collect detailed information about the brand to make better purchasing decisions. Consumers often participate in online brand communities because they facilitate interactive learning and communication (Porter & Donthu, 2008), and engaging with the brand (or its community) generates informational value. Others engage with the brand to obtain rewards or other incentives. Companies regularly provide rewards like loyalty points, lucky draws, and price promotions to encourage engagement, like writing reviews. Monetary incentives have been shown to increase the willingness for short-term participation across all participants of an online brand community (Garnefeld, Iseke, & Krebs, 2012). But rewards may also come from the community which grants social recognition (Winterich, Mittal, & Ross, 2009) or expertise recognition (Hennig-Thurau *et al*., 2004).

Consumer-based factors may furthermore be *personality* related. For instance, people with heightened moral identity are more likely to provide helping behaviors to others that are in need. A variety of personality characteristics (e.g., personal traits, predispositions) have been found to affect the level of CE. For instance, some individuals have a high desire to be positively recognized by others (i.e., self-enhancement). These individuals have been shown to engage more strongly in WOM behaviors (e.g., Hennig-Thurau *et al.*, 2004). Such consumers may also help others, blog more, and generally engage more often in activities that copromote the brand with which the consumer is highly involved (van Doorn *et al.*, 2010). Consumer *involvement* is the "perceived relevance of the object based on inherent needs, values, and interests" (Zaichkowsky, 1985, p. 342). Involvement is a cognitive, affective or motivational construct that describes a certain state of mind (Smith & Godbey, 1991) or perceived personal relevance. Thus, involvement is often regarded as an important antecedent of psychological and behavioral CE. Involvement (with the brand, product or product category) has been found to create greater external search behaviors (Beatty & Smith, 1987), greater depth of mental processing (Burnkrant & Sawyer, 1983), more elaboration (Petty & Cacioppo, 1986), and increased product trials (Robertson, 1976). Brodie *et al.* (2011) regard involvement as a necessary factor for relevant CE levels.

Additionally, *demographics* such as gender have been considered relevant. For instance, women are considered to be more communal-focused and thus more motivated to contribute to the common good of a group compared with men (He, Inman, & Mittal, 2008). Consequently, if women witness any potential harm to the group (e.g., a malfunctioning product), they are more likely to complain or engage in negative WOM in order to warn other consumers and to put pressure on the company to solve the problem (van Doorn *et al.*, 2010). Finally, *consumer resources* such as time, money, and effort as well as *individual abilities*, *experiences* (e.g., internet knowledge), and *specific attitudes* (e.g., attitude toward eWOM, attitude toward complaining online) can determine CE.

Situational and contextual factors

Finally, a broad range of situational and contextual factors determine CE levels. This category includes *company-based antecedents* such as the processes and platforms to support specific consumer actions. In order to foster dialogic consumer–brand communication, companies may set up branded platforms such as brand-sponsored message boards, brand-generated blogs, chat forums or *Facebook* brand pages (Chiou & Cheng, 2003; Yang, Kang, & Johnson, 2010) which enable consumers to voice complaints, concerns, compliments, and suggestions directly to the company (van Noort & Willemsen, 2012). Such platforms facilitate CE, as they provide a convenient and easy way to engage with the company and to contact similar-minded others. According to TNS NIPO (2011), 30 percent of consumers post online complaints in branded environments, while 70 percent use consumer- or third-party-generated platforms such as review sites, consumer blogs, social network sites, recommendation sites, (micro) blogs, and (anti)brand communities. Such online vehicles have certainly increased CE in recent years. Companies may also foster consumer-to-consumer interaction by organizing events like brand fests and company-initiated brand communities (e.g., McAlexander, Schouten, & Koenig, 2002). A body of literature has found that offline and online brand communities can trigger numerous favorable and unfavorable attitudinal and behavioral changes, including customer satisfaction, customer loyalty, and brand advocacy (e.g., Stokburger-Sauer, 2010) as positive CE outcomes, and consumer switching and consumer activism (e.g., Bailey, 2004) as negative outcomes. In contrast, the *political, legal, economic, social, and technological environment* sets the guiding rules for CE. For example, technological progress enabled the introduction of interactive Web 2.0 services which now provide ideal platforms for consumers to share their brand experiences and voice their ideas and complaints.

Outcomes of consumer engagement

CE has consequences for (a) the brand and the associated company, (b) the consumer, and (c) for others. Some of these outcomes are clearly related to the drivers of CE discussed earlier.

Outcomes for the company

Kumar *et al.* (2010) argue that engaged consumers create value for brands and/or companies in four different ways. First, consumers with higher (positive) CE levels exhibit more favorable *purchase behaviors* like additional and repeated purchases through up- or cross-selling (e.g., Cheung *et al.*, 2015). Thus, CE can directly translate into positive financial consequences. CE also causes several *attitudinal consequences* that affect consumers' propensity to maintain the relationship with the brand/company. These attitudinal variables include *trust* (e.g., Casalo, Flavian, & Guinaliu, 2007), *satisfaction* (Coulter, Gummerus, Liljander, Weman, & Pihlström, 2012), *commitment*, and attachment, corporate *reputation* (Dijkmans, Kerkhof, & Beukeboom, 2015), as well as brand *loyalty* (e.g., Bowden, 2009; Dwivedi, 2015; Patterson *et al.*, 2006; van Doorn *et al.*, 2010). For instance, once a consumer is engaged with a brand, he/she may develop enduring approach behaviors (Esch, Langner, Schmitt, & Geus, 2006). In addition, positive CE entails sustained interactions between the consumer and the brand (Hollebeek, 2011a), fostering the development of psychological bonds that can lead to consumer trust (Vivek *et al.*, 2012) and brand loyalty. This suggests that CE directly affects the customer lifetime value for the brand/company. Finally, companies can benefit from CE through feedback for service improvements, innovations, and new product ideas (Kumar *et al.*, 2010). Today, many CE behaviors represent the most important source of corporate knowledge development (Schau *et al.*, 2009).

However, CE does not only affect the engagement agent. Many CE behaviors, like referrals, WOM behaviors, and actions aimed at disseminating information about the brand and consumption experiences, affect the purchase behaviors of other consumers observing the actions of the engaged consumer. This helps the firm to win new customers and results in observers' increased monetary customer value for the firm. Unfavorable CE behaviors (like negative eWOM), on the other hand, may nullify customer value. The detrimental effects of negative eWOM on all phases of the consumer decision-making process, including brand evaluation, brand choice, purchase behavior, and brand loyalty, have been repeatedly demonstrated (e.g., Chakravarty *et al.*, 2010; Sen & Lerman, 2007).

Outcomes for the involved consumer

CE is also consequential for the involved consumer. According to both the theory of consumption values (Sheth, Newman, & Gross, 1991) and the consumer values perspective (e.g., Hollebeek, 2013), consumers' motivation to engage with a focal brand depends on the value expected from the interactive experience. Perceived customer value is defined as "a consumer's overall assessment of the utility of a product/service based on perceptions of what is received and what is given" (Zeithaml, 1988 p. 14). According to Holbrook (1994), values can be intrinsic or extrinsic. When the consumer enjoys an engagement activity for its own sake, he/she is said to derive intrinsic value from it. In this case, CE activities are self-justifying and may be the source of various emotional benefits. In contrast, if CE is prompted by specific programs such as loyalty or reward incentives, there may be direct positive financial consequences providing extrinsic value (van Doorn *et al.*, 2010). Further, when consumers actively involve themselves in the process of coproducing or participating in the design process of a new product, they gain the opportunity to customize the product according to their personal needs. In such cases, greater engagement will be associated with perceptions of greater value received (Vivek *et al.*, 2012). CE also creates feelings of *empowerment* and the opportunity to reinforce one's identity by participating in fan clubs and the like.

Outcomes for others

Finally, over time CE can also generate a broader impact beyond the focal brand and the engaged consumer. For instance, consumers who make suggestions for product improvements and new product ideas can make a company more efficient, which may lead to lower prices and increased customer satisfaction (van Doorn *et al.*, 2010). This enhances consumer welfare in general. In addition, consumers publicly complaining about the company's shortcomings can be responsible for changes in the company itself, but also in the legal and regulatory environment. Critical consumers that are engaged to share their opinions and feelings with others can guide public attention to serious deficits in a specific company. Hence, such individuals are important conveyors of information about the brand and the business conduct of the company behind it to the public. But the same individuals can also help to identify critical topics in service industries by raising public awareness. For instance, the Japanese budget airline *Skymark* came under fire from employees and engaged consumers over introducing extra short minidresses for female cabin attendants, which were said to treat women as products and to invite sexual harassment. The uncovering and public outrage over systematic in-store surveillance of employees at the German retailers *Lidl and Schlecker* is another vivid example. Due to the resulting public pressure, such practices have been reduced enhancing the lives of company employees and others. Similarly, engaged consumers can challenge existing consumption patterns and cultures. This highlights the societal role of CE.

Taken together, the aforementioned insights can be summarized in our last proposition:

Proposition 7 CE plays a central role in the process of relational exchange, where other relational concepts act as engagement antecedents and/or consequences in a dynamic engagement process.

Conclusion

CE has become a central concept in the discussions on consumer–brand relationships in academic research, as well as in practice. It can be defined as a complex, multifaceted relational construct that embodies a consumer's state, which occurs by virtue of interactive consumer experiences with a specific brand. CE consists of psychological and behavioral engagement components expressing a specific intensity level at a given point in time. Psychological engagement represents a consumer's compelling, intrinsic motivation to invest cognitive, emotional, and intentional resources in the interaction with a brand. Behavioral engagement, in contrast, mirrors specific interactive, brand-related behaviors. CE states can be positively or negatively valenced and occur within a broader, dynamic, and iterative engagement process. The iterative nature of the construct implies that specific drivers of CE turn into specific relational consequences that again may act as antecedents in subsequent engagement cycles. CE is a key concept for consumer–brand relationships that is determined by various factors, including a consumer's favorable and unfavorable attitudes toward the brand. Active and passive CE can have far-reaching consequences for brands and companies, consumers, and others alike.

Over the last three decades, the marketing research community has intensively worked on investigating the nature of consumer–brand relationships (e.g., Aaker, Fournier, & Brasel, 2004). Given the immense changes in the communication environment due to developments in ICT, current research has shifted to focusing on concepts and theoretical perspectives that promisingly explain and predict the dynamics in interactive and cocreating consumer–brand relationships, which typically emerge in social media settings (e.g., Malthouse & Hofacker, 2010). In this interactive online environment, CE has emerged as a central concept modeling the changing role of consumers from passive information recipients to active cocreators of brand experiences.

While this chapter presents a summary of the marketing discipline's current state of knowledge concerning the construct's nature and role, it also points to several new routes for future research. First, our discussion concludes that psychological and behavioral CE have to be regarded as the two main components of the complex CE construct. While positively valenced CE has received considerable academic attention in the past, only a few researchers focus on the "dark side of CE" by discussing negative expressions. Future research needs to address this blind spot and generate a better understanding of the nature, components, and scope of negative CE. Researchers' attention could be attracted by the idea of introducing a typology of negatively engaged consumers, considering varying intensity levels of their activism but also motivational aspects triggering their attitudes and behaviors negatively affecting the company. Authors contributing to the antibranding literature have put forward several categorizations for individuals negatively engaged toward a brand or company. For instance, Kucuk (2010) classifies antibrand protesters into experts, symbolic haters, complainers, and opportunists. However, this subject needs further investigation as negative CE behaviors can also be driven by positive psychological CE. Hennig-Thurau *et al.* (2004), for example, assert that (negative) eWOM behaviors are not only caused by an intention to unmask the company's failures in public, but can also be initiated by the complainant's motivation to give the company the opportunity to demonstrate their customer service capabilities under the supervision of their customers and other stakeholders (i.e., positive psychological CE).

Second, our review shows that the inconsistencies and limitations of theoretical conceptualizations of CE regarding the concept's antecedents and consequences are still evident. Certainly, considerable progress has been made in the investigation of the determinants that can stimulate positive CE. Nevertheless, the same is not true for negative CE. Earlier research has investigated, for example, the triggers of negative eWOM or complaining, such as negative emotions (e.g., Willemsen, Neijens, & Bronner, 2013). However, insights remain limited, as the complex psychological and behavioral expressions, as well as the varying intensity levels of negative CE, cannot be explained adequately with the existing approaches. Pioneering research into the topic of negative CE antecedents could protect companies from suffering possible far-reaching unfavorable effects, such as declining sales.

Third, our discussion views CE also as a dynamic process. Nevertheless, research investigating the iterative nature of the concept is scarce. In the future, scholars should address this issue and furnish us with fresh insights on the self-propelling nature of CE that either triggers a progressively brand–consumer connection or, the opposite, an increasingly antagonistic relationship.

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