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UNIVERSITY OF TURKU

EMPOWERING EMAIL MARKETING

Mari Hartemo

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University of Turku

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To my family

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ABSTRACT

The purpose of this dissertation is to explore an empowering email marketing strategy that marketers can use for effective, modern email marketing. It describes the strategic transformation of email marketing from one-way persuasive communication to customized two-way interaction using Pettigrew´s (1987) context, content, process (CCP) framework. Consumer empowerment is used as the specific context in which email marketing takes place, and the content and process of email marketing are examined in relation to it.

Changes in the business environment, accelerated by the Internet, have shifted the power dynamic between consumers and organizations, transforming their relationship from reactive transaction to proactive collaboration. This has created a need to move beyond persuasive marketing to more interactive and tailored communication. Compared to other interactive marketing practices, such as social media or mobile apps, email seems to be stuck in old, inefficient ways of implementation. Consumers view marketing emails as annoying and irrelevant, even though marketers have better opportunities than ever before to use consumer data to tailor and target messages according to consumer expectations.

The research consists of three sub-studies: a systematic literature review using inductive qualitative analysis, and two online controlled experiments using different deductive quantitative analysis methods. It evaluates real-world consumer behavior and seeks to answer the main research question: *What are the implications of an organization's adoption of an empowering email marketing strategy?*

The dissertation proposes that adopting an empowering email marketing strategy requires advanced first-party data management that enables interaction. Email marketing should be based on permission, and the contents of emails should be tailored to the preferences of the individual recipients, but by directly asking about their preferences rather than inferring them from observed data. According to the study's empirical findings, content matters: relevant content and active engagement improve behavioral email marketing results (open rates, click-to-open rates, and conversion rates). The study also recommends testing email content in the marketer's own operational environment.

KEYWORDS: Interactive marketing, email marketing, customization, personalization, consumer data, empowerment

TURUN YLIOPISTO
Turun kauppakorkeakoulu
Johtaminen ja yrittäjyys
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TIIVISTELMÄ

Väitöskirjassa tutkitaan voimaannuttavan sähköpostimarkkinoinnin strategiaa, jota markkinoijat voivat käyttää tehokkaaseen, nykyaikaiseen markkinointiviestintään. Tutkimus kuvaa sähköpostimarkkinoinnin muutosta yksisuuntaisesta massaviestinnästä räätälöidyksi kaksisuuntaiseksi vuorovaikutukseksi käyttäen viitekehyksenä Pettigrew'n (1987) organisaatiomuutoksen kontekstia, sisältöä ja prosessia kuvaavaa mallia. Kontekstina on kuluttajien voimaantuminen, jonka puitteissa tarkastellaan sähköpostimarkkinoinnin sisältöä ja prosessia.

Internetin kiihdyttämät muutokset liiketoimintaympäristössä ovat muuttaneet kuluttajien ja organisaatioiden välisiä valtasuhteita ja tehneet reaktiivisesta vaihdannasta aktiivista yhteistyötä. Muutoksen myötä on tullut tarve siirtyä suostuttelevasta massamarkkinoinnista vuorovaikutteisempaan ja räätälöidympään viestintään. Muihin interaktiivisen markkinoinnin muotoihin, kuten sosiaaliseen mediaan tai mobiilisovelluksiin verrattuna, sähköposti näyttää kuitenkin juuttuneen vanhoihin, tehottomiin toteutustapoihin. Kuluttajat pitävät markkinointisähköposteja ärsyttävinä ja turhina, vaikka markkinoijilla olisi aiempaa paremmat mahdollisuudet käyttää kuluttajatietoja viestien räätälöimiseen ja kohdistamiseen.

Tutkimus etenee kolmen osatutkimuksen kautta. Systemaattisessa kirjallisuuskatsauksessa käytetään induktiivista kvalitatiivista analyysiä ja kahdessa koeasetelmassa käytetään deduktiivisia kvantitatiivisia analyysimenetelmiä. Työ arvioi kuluttajien käyttäytymistä todellisessa päätöksentekotilanteessa ja etsii vastausta kysymykseen: *Millaisia vaikutuksia voimaannuttavan sähköpostimarkkinointistrategian omaksumisesta on organisaatioille?*

Väitöskirja esittää, että voimaannuttavan sähköpostimarkkinointistrategian omaksuminen edellyttää kehittynyttä, vuorovaikutuksen mahdollistavaa ensimmäisen osapuolen tiedonhallintaa. Sähköpostimarkkinoinnin tulee perustua lupaan ja sisältöön, joka on räätälöity yksittäisten vastaanottajien mieltymysten mukaan kysymällä suoraan heidän mieltymyksistään havaitun datan hyödyntämisen sijaan. Empiiristen tulosten mukaan uutiskirjeen sisällöllä on väliä: relevantti sisältö ja vuorovaikutus parantavat käyttäytymiseen perustuvia sähköpostimarkkinoinnin tuloksia (avauksia, klikkauksia ja konversioita). Tutkimus suosittelee sähköpostin sisällön testaamista markkinoijan omassa toimintaympäristössä.

ASIASANAT: Interaktiivinen markkinointi, sähköpostimarkkinointi, kustomointi, personointi, kuluttajadata, voimaantuminen

Acknowledgements

Although I found school to be effortless, the idea of obtaining a doctorate never crossed my mind. However, it eventually became a reality, leading to a prolonged yet fulfilling expedition that provided me with a purpose for a full decade. I composed my dissertation in three different countries: Italy, Norway, and Finland. Along the way, my children have matured, and my employment has changed from advertising to academic management.

My dissertation topic stems from an observation I made while working at an advertising agency. It seems that the more standardized the marketing content aimed at consumers, the better it is considered to be. I am concerned about the disregard for the consumer's point of view. In considering this issue, the concept of "consumer empowerment" emerged as potentially transformative. As a result, this dissertation examines empowering email marketing.

My entire research trip would have come to nothing without the support and guidance of my supervisor, Professor Reima Suomi, whose encouragement to continue my research beyond the completion of my master's thesis is very much appreciated. I am also indebted to my second supervisor, Associate Professor Ulla Hakala, for her extensive marketing expertise and unwavering encouragement, despite my slow progress.

Working full-time resulted in limited contact with the academic community. As Reima pointed out midway through the process, it is uncommon (and unfortunate) for a dissertation to be published without the author being known in the community. I acknowledge my lack of involvement and familiarity and offer my apologies. Nevertheless, the courses I attended at the Turku School of Economics significantly enhanced my knowledge. I specifically wish to thank Professor Aino Halinen-Kaila for providing inspiration and valuable insights during the Workshop on Scientific Writing course, which empowered me to continue my research.

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This project was made possible by the generous support of my employers, superiors, and clients. Initially, my superior, Dr. Sami Relander provided guidance and secured multiple research grants through his recommendations. The Internet Sales department of Finnair, my client at the time, graciously agreed to collaborate. Later, at Turku University of Applied Sciences, my superior, Dr. Sami Savolainen granted several short sabbaticals that allowed me to advance my work. Additionally, my colleagues offered their insights and encouragement throughout the project, for which I am grateful.

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Over the years, I have printed a multitude of articles, largely due to the laser printer provided by my father-in-law, Matti Hartemo. In addition, I have received invaluable support from numerous other relatives from Southern Finland and Rovaniemi.

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I wouldn't have reached this achievement without the support of my spouse, Mika Hartemo. I am grateful for your encouragement, financial support, feedback, proofreading, and unconditional faith in my success. I love you. Pinja and Patrik, the best children in the world – please remember that you possess all the potential that your mother has, and much more.

October 2023

Mari Hartemo

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List of Original Publications

This dissertation is based on the following original publications, which are referred to in the text by their Roman numerals:

I Hartemo, M. E-mail marketing in the era of the empowered consumer. *Journal of Research in Interactive Marketing*, 2016; Vol. 10 No. 3: 212–230.

II Hartemo, M., Suomi, R. & Hakala, U. Towards Improved Performance: A Model for Testing E-mail Newsletter Design. *Journal of Electronic Commerce in Organizations*, 2016; Vol. 14 No. 3: 1–16.

III Hartemo, M. Conversions on the rise – modernizing e-mail marketing practices by utilizing volunteered data. *Journal of Research in Interactive Marketing*, 2022; Vol. 16: 585–600.

The original publications have been reproduced with the permission of the copyright holders.

1 Introduction

1.1 Background and motivation

As markets and business environments change, so must marketing. Changes in the business environment, accelerated by the Internet, have shifted the power dynamic between consumers and organizations (Labrecque et al., 2013; Pires et al., 2006; Rezabakhsh et al., 2006), transforming their relationship from a reactive transaction to a proactive collaboration (Andersen & Johansen, 2016; Naletelich et al., 2023). This phenomenon, referred to as *consumer empowerment*, has created the need to move beyond the persuasion paradigm of marketing to a more interactive and tailored approach (Mitchell, 2012). This idea is the starting point for this dissertation, which looks for a modern email marketing strategy that works in the context of empowerment.

In general, interactive media technologies such as email allow for a tailored and personalized approach to marketing (Wang, 2021). However, compared to, for example, social media, live streaming, mobile apps or gamification, email still seems to be based more on one-way persuasive communication rather than participation and engagement (Brandon, 2015; Wang, 2021). Marketing emails are perceived as irritating and irrelevant, are sent in excess, and are therefore often referred to as junk email or spam (unsolicited commercial email). Alarmingly, 56% of consumers say that more than half of the emails they receive are marketing messages, and only 13% find them useful (Data & Marketing Association, 2020a).

On the other hand, email marketing has long been a top profit generator for marketers. In 2021, email was the most-used interactive media channel among marketers, providing an average ROI (return of investment) of 93%, compared to 102% for mobile marketing, 88% for paid search, 81% for social media, and 79% for digital display ads (ANA, 2022). The global email marketing market was valued at 7.5 billion USD in 2020, and it is expected to grow to 17.9 billion USD by 2027 (Statista, 2021). Nearly 80% of marketers consider email important to the overall success of their business, and 54% of them plan to increase the number of marketing emails they send (Litmus, 2020).

How is it possible to bridge the gap between how consumers and marketers think about email marketing? This dissertation explores an empowering email marketing strategy that marketers can use for effective, modern email marketing. Marketing is viewed as a strategic asset that organizations can use to position themselves in the market, gain competitive advantage, and achieve positive business outcomes (cf. Baines & Lynch, 2005). Marketing communication plays an important instrumental role in achieving these goals.

One might wonder why study email marketing, which has been declared relatively obsolete in contemporary marketing, compared to more recently emerging interactive marketing practices (Brandon, 2015). The numbers show that email use is not declining, and even the future looks promising. There are over four billion daily email users worldwide, and the number is expected to rise to 4.6 billion by 2025 (Tankovska, 2021). Future prospects are enhanced by the fact that younger generations also started using email during the COVID-19 pandemic (Campaign Monitor, 2020). Even before that, 48% of generation Z members reported that they expect their email use to increase in the future (Schultz, 2018).

The advantage of email marketing research is the ability to use objective clickstream data on customer behavior, for example, to evaluate the performance of different execution tactics in email content elements, or to measure the actual customer response to emails. Digital analytics can help avoid the research bias that can occur in attitudinal measures such as surveys or interviews, in which consumers may adjust their responses to the research situation (Järvinen & Karjaluoto, 2015). The challenge is to find the right metrics for each organization and situation, as there is no industry-wide measurement standard and the relevant metrics depend on the objectives of the organization (Järvinen, 2016). This dissertation proposes the use of three simple metrics: open rate, click-to-open rate, and conversion rate, to evaluate the consumer response to email marketing.

Ultimately, email *is* an interactive (Mulhern, 2010), personal (Lüders, 2008) medium that enables two-way communication between organizations and consumers. Because email is also a data-driven medium, marketers use information in customer databases to target and tailor their message (Mulhern, 2010). Artificial intelligence is helping to expand the capabilities of email through, for example, automated content, predictive analytics, customer data, and machine learning (Dziak, 2021). Dynamic emails display content that changes based on customer behavior or on historical data, allowing for a more personalized experience (Massey, 2018). Artificial intelligence tools learn from customer interactions to further improve the accuracy of personalization (Kumar et al., 2019). Although real-time and dynamic personalization has been talked about for nearly 20 years (Vesanen & Raulas, 2006), rapid technological advances in the 2020s will finally make it possible to bring personalization to email marketing on a larger scale.

Empowerment, on the other hand, calls for the activation of customers in the marketing communication process. As both a value orientation and a theoretical model, the empowerment approach replaces the term "customer" with "participant" (Zimmerman, 2000). From this perspective, automated system-driven marketing communication is simply an improved form of sender-receiver communication, in which the customer remains passive and the marketer attempts to improve marketing outcomes by personalizing the message (cf. Strycharz et al., 2019). Instead, a customer-driven process shifts the power to the consumer and evolves marketing communication in a more participatory and engaging direction (Wang, 2021).

In both the academic and practitioner worlds, big data and algorithmic personalization, rather than interactions and consumers, seem to dominate the conversation (Strycharz et al., 2019). This dissertation suggests that it is participation that unlocks the full potential of computer-mediated communication. Furthermore, as legislators plan to tighten the regulation of tracking technologies that enable personalized communications to consumers (see González et al., 2020), it is important to look for alternative ways to generate effective communication. Therefore, this dissertation reconceptualizes modern, empowering email marketing through Pettigrew´s (1987) context, content, process (CCP) framework, as shown in **Figure 1**.

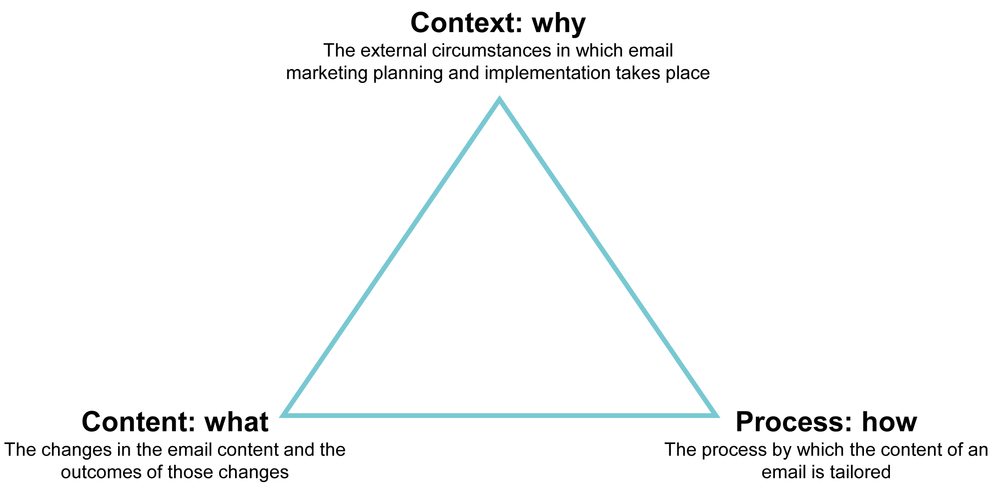

Figure 1. The CCP framework guiding the research (adapted from Pettigrew, 1987).

1.2 Context, content, process framework

The strategic transformation of email marketing from one-way persuasive communication to customized two-way interaction is examined through the three interrelated dimensions of context, content, and process, as recommended by Pettigrew (1987). His framework is used as a meta-level structure (or method theory;

see Lukka & Vinnari, 2014) to combine empowerment theory with data collected through voluntary participation, to create a holistic understanding of an empowering email marketing strategy. This extends the use of the CCP framework into a new field.

Originally designed to study strategic change in organizations, the CCP framework has provided a structure for studies in, for example, applied psychology, information systems strategy, implementation and evaluation, leadership and management, performance measurement, marketing metrics, and political marketing (Baines & Lynch, 2005; Järvinen & Karjaluoto, 2015; Pettigrew, 2012; Sminia & de Rond, 2012; Stockdale & Standing, 2006; Walsham & Waema, 1994). Some studies use the framework in a methodological sense, while a number of studies use it to emphasize that there is a contextual aspect, a content aspect, and a process aspect in the research object (Sminia & de Rond, 2012), and some use it because it helps to combine disparate findings into a holistic picture (Järvinen & Karjaluoto, 2015; Stockdale & Standing, 2006), as in this dissertation.

Pettigrew (1987) defined *context* as the social, economic, political, and competitive circumstances in which the organization operates. In addition to this "outer", external context, there is also an "inner", internal context that refers to the structure, corporate culture, and political context within the organization (Pettigrew, 1987). This study focuses exclusively on the external context because the research emphasizes empowerment, which is an external phenomenon that transcends organizational boundaries. In addition, in-depth familiarity with the internal operating environment of two different case organizations would have required different research methods from those used in this study.

In terms of external content, Pettigrew's definition now seems a bit narrow. Therefore, in this study, it is expanded to include the technical and legal conditions of the operating environment. In addition, it should be noted that there are other possible external circumstances that affect the organization's operations, such as health and environmental factors, but these are not examined in this study. Within these limitations, *email marketing context* refers to the external circumstances in which email marketing planning and implementation take place. The study seeks to answer *why* the requirements of email marketing have changed with empowerment.

The *content* dimension of Pettigrew (1987) refers to the intended content of a chosen strategy, in other words, *what* is changing. Walsham and Waema (1994) adapted content in the context of computer-based information systems by defining it as including hardware, software, operating systems, and related technologies. Baines and Lynch (2005, 3) defined content as *"the chosen strategy and the specific actions that follow in order to implement the plan."* They suggested that content is similar in political marketing and in services marketing. Martinez et al. (2010) divided the content of performance management reviews into two categories: subjects (e.g., data) and outcomes (e.g., development plans, performance measures, commitment). Based on these further developed definitions, in this study, *email marketing content* refers to the changes in the email content and the outcomes from those changes.

The third corner of the CCP framework, *process*, refers to the actions, reactions and interactions during the organizational change. Pettigrew (1987, 657) stated that: *"The starting point for the analysis of strategic change is the notion that formulating the content of any new strategy inevitably entails managing is context and process."* Baines and Lynch (2005) amended Pettigrew's original process definition with a learning-based process that begins with an analysis of the current situation and continues with constant monitoring and feedback to review and possibly modify (political marketing) campaigns. This learning-by-doing approach is also emphasized in Pettigrew's reprise (2012, 1311): *"Putting a concept into practice leads to valuable clarification of the original but only if the participants have a developed capacity for learning, experimentation, and inventiveness."* In this article, Pettigrew elaborated on his earlier work by linking changes in context and processes to outcomes. Here, the outcome, whether intermediate or final, provides a focal point that allows for the investigation of variation across comparisons. He advises to *"first, set up a comparative study which exposes variation in some outcome or intermediate effect, and then explain that outcome, or effect"*(Pettigrew, 2012, 1310). This is what is done in the third sub-study, which explains the outcomes of emails with different tailoring processes. Thus, in this dissertation, *email marketing process* refers to the process by which the content of an email is tailored (how). An equivalent interpretation of the process dimension has been used by, for example, Järvinen and Karjaluoto (2015) and Martinez et al. (2010).

Tailoring is a large area of research in itself. In this dissertation, tailoring is referred to as personalization or customization, but depending on the field of study, previous literature has described it using terms such as profiling, segmentation, adaptation, mass customization, and mass personalization, to name just a few (Fan & Poole, 2006; Vesanen & Raulas, 2006). What they have in common is the process nature of tailoring. Several authors associate personalization with phases that are connected in a dynamic loop (Chandra et al., 2022; Vesanen & Raulas, 2006; Zarouali et al., 2022). According to Vesanen and Raulas (2006), the personalization process involves collecting and analyzing customer information from internal and external sources and customer interactions, tailoring marketing communication based on customer profiles, and targeting marketing activities. In the current research, the focus of the personalization process is on customer data that is collected during customer interactions.

1.3 Purpose of the research

The dissertation uses consumer empowerment as a theoretical lens for understanding the demands of contemporary email marketing. It aims to reconceptualize email marketing in line with the expectations of modern, empowered consumers. Thus, the purpose of this dissertation is to explore an empowering email marketing strategy that marketers can use for effective, modern email marketing. The main research question is: *What are the implications of an organization's adoption of an empowering email marketing strategy?* The answer is sought through three sub-questions that were identified during the research process. These are summarized in **Table 1** below.

Table 1. Research questions in the original articles.

Research question	Method	Dimension	Article
RQ1: How are changing consumer demands affecting email marketing?	Systematic literature review	Context: **why** the requirements of email marketing have changed	Article I
RQ2: How can we measure the impact of content changes on email marketing recipient behavior and optimize the outcome?	Controlled between-subject experiment (multivariate testing)	Content: **what** are the elements of an email, and **what** are the results of changing these elements	Article II
RQ3: How does voluntary data affect email marketing conversions?	Controlled longitudinal between-subject experiment	Process: **how** the process of tailoring the content of an email affects the outcomes	Article III

1.4 Outline of the dissertation

This dissertation is divided into two parts. Part I consists of five chapters, beginning with the introductory chapter. The second chapter positions the study and extends the theoretical discussions of the original publications. The methodological perspectives of the work are discussed in the third chapter. The findings reported in the articles are briefly presented in the fourth chapter. Finally, the theoretical and practical implications of the dissertation are discussed, and limitations are summarized in the fifth chapter. Part II consists of the three previously published articles.

2 Conceptual and Theoretical Foundations

This chapter outlines the theoretical foundations of the dissertation. The following three sections review the literature using the structuring framework of the research, as shown in **Figure 1**. The first section introduces the theoretical background of *why* the requirements of email marketing have changed (i.e., context: the external circumstances in which email marketing planning and implementation takes place). The second section conceptualizes *what* the elements of an email are and the results of changing those elements (i.e., content: the changes in the email content and the outcomes of those changes). Finally, the third section lays the theoretical foundation for *how* the process of tailoring the content of an email affects the outcomes (i.e., the process by which the content of an email is tailored). The chapter complements the literature covered in the original articles in Part II.

2.1 The impact of consumer empowerment on email marketing

2.1.1 Conceptualization of empowerment

From a consumer perspective, the industrial revolution of the 19th century helped consumers meet multiple needs as companies increased their production capacity (Berthon et al., 2000). In the industrialized countries, potential supply exceeded demand, allowing consumers to choose from among several different brands after the Second World War (Berthon et al., 2000). Marketing communications became commonplace, legislation began to protect consumers, and later, services also differentiated competing products (Berthon et al., 2000; Davies & Elliott, 2006). The information revolution of the 20th century gave consumers access to more information about the market, and freedom of choice expanded due to the global reach of the Internet (Pires et al., 2006). At the turn of the millennium, the ability to share information with peers evolved with Web 2.0 applications. Outbound marketing, which marketed products to anyone regardless of interest, was complemented by inbound marketing, in which customers actively sought out information of interest to them (Rudman & Bruwer, 2016). Mobile platforms provided consumers with ubiquitous connectivity, making them “always on” (Deighton and Kornfeld, 2009). By the 2010s, the data collected from consumers and the analytics based on it enabled the tailoring of products and messages according to consumer expectations, even for individual consumers (Line et al., 2020; Yun et al., 2020). Today, artificial intelligence and automation are accelerating these processes, enabling an active connection between organizations and consumers in real time (Wang, 2021).

The development described above has led to consumer empowerment, making consumers more knowledgeable and better informed than before (Pires et al., 2006). According to the theory of empowerment, *“actions, activities, or structures may be empowering, and the outcome of such processes results in a level of being empowered”* (Zimmerman, 2000, p. 45). At the individual level, empowerment processes include learning to make decisions, managing resources, and working with others, while outcomes include a sense of control, critical awareness, and participatory behaviors (Zimmerman, 2000). Empowerment emphasizes capabilities instead of risks, and empowered individuals feel more powerful and positive toward their skills.

The concept of power is closely related to empowerment. In the marketing literature, power is typically defined from a liberal perspective, in which power is seen as something that can be exercised by someone who has power over someone who does not (Shankar et al., 2006). Traditionally, this means that the company exercises control over the consumer (Yildiz, 2007). However, consumer empowerment has rebalanced the power structure, placing consumers at the center and making them active partners to be “marketing with” (Vargo & Lusch, 2004), highlighting the importance of inbound marketing (Rudman & Bruwer, 2016).

There is a wealth of literature on empowerment, regarding, for example, employees, patients in health care, or users of information systems. Many of these are characterized by the transfer of power from organizations to individuals. Examples include helping patients to make autonomous, informed decisions that affect their health (Anderson & Funnell, 2005; Aujoulat et al., 2007; Feste & Anderson, 1995), trusting employees and treating them as partners (Coleman, 1996; Gomez & Rosen, 2001), activating users as drivers of information system infusion (Clement, 1994; Hee-Woong & Gupta, 2014), and engaging consumers in the co-creation of advertising to reduce harmful behaviors (Naletelich et al., 2023).

In the domain of marketing, empowerment translates, for example, into easily accessible market information for consumers, interactive communication in several alternative channels, the ability to share information with a wide range of audiences, bargaining power, or additional resources acquired through crowdsourcing (Berthon et al., 2000; Constantinides & Fountain, 2008; Labrecque et al., 2013; Urban, 2005).

What these have in common is that the information revolution, especially the Internet, is seen as a key driver of empowerment. In other words, new skills and knowledge gained through the Internet have empowered consumers. Therefore, in this dissertation, empowerment refers to the Internet-enabled changes in the knowledge and capabilities of consumers that cause organizations to adapt their marketing strategies toward consumers.

The forces that influence consumer empowerment are generally viewed in a fairly similar way in the marketing literature. However, views on the direction of empowerment differ. Opposing views on empowerment question, for example, whether the new power balance benefits consumers at all, and whether it is partial or just a pseudo-effect in which organizations actually still hold power (Bonsu & Darmody, 2008; Newholm et al., 2006; Pires et al., 2006; Saren, 2011; Shankar et al., 2006). Is it enough if consumers are able to determine what kind of information they want and how often (Pires et al., 2006), or what time the marketing message is delivered (Bacile et al., 2014)?

In the end, it is easy to see that meeting the needs of an empowered consumer motivates organizations because of, for example, increased sales, favorable attitudes, loyalty, increased customer lifetime value, and reduced consumer anxiety (Bacile et al., 2014; Fletcher, 2003; Kucuk, 2009; Kucuk & Krishnamurthy, 2007; Micheaux, 2013; Strycharz et al., 2019).

2.1.2 Conceptualization of email marketing

Email as a marketing communication channel can be categorized under direct marketing and its extension, interactive marketing (Mulhern, 2010). Interactive media technologies enable two-way communication with addressable messages that *"can be customized in ways that make messages more relevant to consumers"* (Mulhern, 2010). Wang (2021, 1) amended the definition to "*the bi-directional value creation and mutual-influence marketing process through active customer connection, engagement, participation, and interaction.*" Other interactive marketing technologies include virtual reality simulations, chatbots, voice-activated content, live streaming, and mobile and messaging applications, among others (Wang, 2021). What they have in common is that interactive marketing, especially when combined with social media, is effective in developing a more tailored and personalized approach (Wang, 2021).

Email can also be classified as a personal medium (Lüders, 2008), although it has often been used in a similar way to mass media (Brandon, 2015). From a marketer's perspective, email is both a push (outbound) and a pull (inbound) marketing communication channel (Spilker-Attig & Brettel, 2010): emails are sent to consumers with the aim of increasing sales, building brands, strengthening customer relationships and sharing information (Merisavo & Raulas, 2004); and consumers subscribe to these emails, for example, in order to getter better deals, know the latest news, or show their brand loyalty. In the era of the empowered consumer, the traditional one-way communication model has lost ground to two-way, more personalized communication (Bacile et al., 2014).

Email marketing is data-driven by nature. It uses information in databases to enable precise targeting and tailoring of the message, and a response mechanism that enables evaluation of performance metrics (Mulhern, 2010). Customer relationship management is necessary in email marketing to evaluate the metrics of customer behavior and to tailor communication according to individual preferences (Mulhern, 2010). The use of artificial intelligence provides further opportunities, such as predictive marketing analytics and machine learning to predict future behavior (Dziak, 2021; Haleem et al., 2022).

The limitations of email marketing are due to intrusiveness and customer privacy (Mulhern, 2010). Unsolicited commercial email (spam) has decreased the acceptance of email marketing (Heinonen & Strandvik, 2007). Its performance has suffered not only from intrusiveness, but also from technical reasons: spam filtering software also blocks desired emails (Pavlov et al., 2008). Privacy concerns are caused by the extensive collection and use of consumer information in ways that violate data protection and privacy (Mulhern, 2010). As a result, laws have been enacted to prevent unsolicited commercial emails. For example, in the European Union (EU), explicit, specified and informed consent to send email marketing is obligatory (European Union, 2019).

According to the literature, today's consumers want to control the information flow, frequency, timing, and content of the messages, and consider only the emails they subscribe to as important and relevant (Bhatia, 2020; Chang et al., 2015; Danaher & Dagger, 2013; Krafft et al., 2017). These are the ingredients of an empowering email strategy, which will be explored in more detail in the next section.

2.1.3 Empowering email marketing strategy

By combining the characteristics and capabilities of email (interactive, personal, data-driven) with the changes brought about by consumer empowerment (transforming communication into active collaboration), the following conditions can be formulated for an empowering email marketing strategy:

1. Communication is permitted.
2. Active participation is possible.
3. Content is relevant.

First, as mentioned in the previous section, obtaining permission to send marketing communication is central to an empowering email marketing approach. In line with the commitment-trust theory of Morgan and Hunt (1994), asking for an informed opt-in creates trust and paves the way for commitment. In other words, increasing empowerment creates trust, and consumers become more actively engaged (Shin et al., 2020). In permission marketing (Godin, 1999), the consumer has the power to decide whether to begin the communication relationship by subscribing to emails from an organization, or to end the relationship by unsubscribing. When the marketer respects these boundaries, commitment and trust in the relationship are reinforced, and efficiency, productivity, and effectiveness are improved.

The positive effect of prior consent on outcomes has been known since the days of traditional direct marketing (Krishnamurthy, 2001), and later marketing and information systems researchers have been able to link trust to commitment, participation, and relevant content. For example, Yildiz (2007) demonstrated that commitment contributed to a customer's acceptance of a newspaper's permission request. Hashim and Tan (2015) concluded in their study of business online communities that the intention to share knowledge is partially mediated by affective commitment and identification trust. Zhang and Liu (2021) suggested that relationship commitment directly influences knowledge-sharing intention in online health communities. Bao and Wang (2021) found that the sense of trust contributes to commitment and encourages consumers to participate in microblogging. According to their findings, relevant content strengthens trust, which increases commitment, which in turn increases participation. Taken together, these stages form the positive cycle of trust-commitment-participation-relevant content, as shown in **Figure 2**.

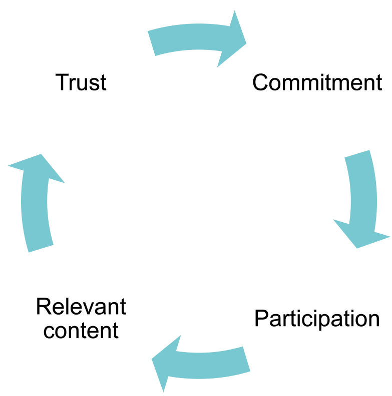

Figure 2. Cycle of trust-commitment-participation-relevant content.

Second, activating consumers to participate in the communication process is important in terms of content relevance. Interactivity is an important part of modern marketing practice (Wang, 2021), but as a concept it is *“merely a property of the medium, while interaction results from the activation of its interactive capacities”* (Yildiz, 2007, 8). Therefore, it is important to design business processes that enable interactivity in communication. An active relationship requires two-way communication through active connection, engagement, and participation (Wang, 2021). When viewed through the lens of empowerment, only consumers themselves can decide whether or not an interaction will occur (Yildiz, 2007). According to Krishnamurthy (2001), the lowest level of consumer participation is exit, while the highest level of consumer participation is active engagement and loyalty.

Third, relevant content takes individual preferences and needs into account. Section 2.2.2 Relevant content concentrates on this aspect of the empowering email marketing strategy. Knowledge is a key source of competitive advantage for today’s marketers, who are increasingly collecting, processing, and analyzing consumer data and using it to tailor their marketing to individual needs (Kumar et al., 2019). Artificial intelligence automates many of these functions and can help create relevant marketing messages, meaning personalized marketing content (Haleem et al., 2022; Kumar et al., 2019). However, in the context of the empowered consumer, a different perspective is needed. In customer-decided tailoring, or customization, preferences and information related to, for example, interests, beliefs, values, and other lifestyle characteristics are voluntarily collected from consumers. This aspect of an empowering email marketing strategy is explored in more detail in Section 2.3 Process of tailoring email marketing. Before that, the content aspect (what) of Pettigrew’s framework (1987) is introduced. The next section conceptualizes the changes in the email content and the outcomes of these changes.

2.2 Changes in email content

2.2.1 Elements of email content

Email content consists of several elements. In this dissertation, these elements refer to the appearance, textual and graphical content, and form of a newsletter sent via email, as well as the related heading and sender information (Ellis-Chadwick & Doherty, 2012, explain these in more detail). When sent regularly, some of the elements change with each email—typically, the subject line and the message content—and some are more fixed, such as the sender, layout, or format. These elements form the *subjects* of the content dimension of Pettigrew’s framework (1987). The different configurations of content elements lead to *outcomes* that can be measured with attitudinal or behavioral data. The measurement of email marketing outcomes is described in Section 3.2 Measurement. It is worth noting that other factors, such as the frequency and timing of the emails, can also affect these outcomes. For example, Stone and Jacobs (2008) suggest that the distribution list has a 40% impact, the content (copy and layout) has a 30% impact, the offer has a 20% impact, and the timing has a 10% impact on the outcome of a direct marketing campaign. This dissertation excludes aspects other than email content as beyond its scope.

Today's emails are typically in HTML format and correspond to a web page displayed in a browser. Interactive content is also possible in email, but according to industry practitioners, it is still rare. In 2020, half of the respondents to the State of Email Report stated that they did not intend to use interactive elements, such as forms, carousels or image galleries in the near future (Litmus, 2020).

Designing the emails is challenged by the diversity of email software: different clients can display the content in different ways. In 2021, the most common clients were Apple iPhone Mail (iOS Mail), Gmail, Apple Mail (macOS Mail) and Microsoft Outlook (Litmus, 2021). Emails are increasingly read on mobile devices. In 2021, the share of mobile was 45%, webmail 36%, and desktop email clients 19% (Litmus, 2021). In this regard, email marketing is approaching mobile marketing such as SMS, in-app, and push notifications (Balasubramanian et al., 2002; Tong et al., 2020).

The results of Haq (2009) showed that attitudes toward email marketing are strongly dependent on the characteristics of the message. Thus, it is mainly the message itself that influences its value and consumer attitude. Lewis et al. (2013) also emphasized that qualitative elements of email marketing, such as content and design, have a significant impact on consumer attitudes. According to industry reports, consumers prefer emails with a clear purpose, call to action and benefit (Data & Marketing Association, 2020a). In terms of preferred content, consumers highlight discounts and offers, email receipts, advanced notice of new products, and competitions (Data & Marketing Association, 2020a), while marketers indicate that advice, information and tutorials also help them to achieve their campaign goals (Data & Marketing Association, 2020b). When consumers were asked why they like emails, offers (52%) and relevance (50%) were the most important reasons, followed by brand preference (36%) and containing useful information (36%) (Data & Marketing Association, 2020a).

Academic research has found similar results. For example, Sahni et al. (2017) found that individuals who received emails with an offer spent 37% more money than those who did not receive an offer. Chittenden and Rettie (2003) showed that a well-crafted, permissioned recipient list, along with a strong incentive detailed in the subject line, improved response rates. Brinson et al. (2018) concluded that meaningful promotional messages are a constructive and fruitful way to connect with consumers.

2.2.2 Relevant content

There is a broad consensus among both practitioners and academics that targeting the right message at the right person with the right content is essential for marketing success (Strycharz et al., 2019). Relevant content directly addresses an individual's interests and concerns, making the information more personally meaningful and therefore more engaging. This can lead to more favorable attitudes and behaviors (see, e.g., Bacile et al., 2014; Bhatia, 2020). Indeed, several studies have shown that relevance affects the performance of email marketing (Cases et al., 2006; Chittenden & Rettie, 2003; Haq, 2009; Lewis et al., 2013; Martin et al., 2003; Micheaux, 2011; Park & Lee, 2012; Park et al., 2005; Sigurdsson et al., 2013).

The relevance of the message is noted in Petty and Cacioppo's (1986) popular framework for explaining how individuals process persuasive messages and make decisions. Their elaboration likelihood model of persuasion (ELM) suggests that the level of elaboration depends on a number of factors, including the individual's motivation and ability to process information, the amount of distraction or competing information present at the time, the opportunity to see, and the relevance of the message.

Previous studies have shown that personally relevant marketing communication motivates individuals to engage with the message content (Micheaux, 2011). Tam and Ho (2005) found that matching preferences lead to greater elaboration and have a positive effect on choice-making by the individual. Although they emphasized that the ELM does not imply that an adequately elaborated message will necessarily lead to a favorable outcome, there are studies that show otherwise. For example, in their study of email personalization, Postma and Brokke (2002) asked recipients to name their three favorite contents. The following eleven emails contained content tailored to these preferences. It turned out that the most popular content resulted in 40% more clicks than the third most popular content. Their study suggests that the more relevant the content is, the better the outcome.

"*Relevance of the message is at the heart of personalization,"* said a marketing practitioner interviewed by Strycharz et al. (2019, 642). Personalization makes email marketing more memorable and persuasive by making messages relevant to individuals through the inclusion of personalization cues (Maslowska et al., 2011). In the simplest cases, these cues, such as the recipient's name, do not change the content, but give the *impression* that the message is tailored to the individual. This is what happened in the experiment by Maslowska et al. (2011), in which the recipient's name was used in the personalized version of the email. They found that this type of personalization led to a more positive evaluation of the message, but did not affect attention, cognitive activity, attitude, intention, or behavior. It is possible that in this case, the personalization cues signaled the persuasion attempt rather than the relevance of the message, or that the personalization did not match the individual's personal preferences (Maslowska et al., 2011). Practitioners also mention that low quality of content and a mismatch of preferences lead to ineffective communication (Strycharz et al., 2019). Overly personalized messages can lead to a sense of loss of autonomy, making consumers more resistant to persuasion (Brinson et al., 2018).

2.2.3 Examining the impact of changes through testing

Pettigrew (2012) emphasized the importance of experimentation when studying change in organizations. In his framework, a learning-by-doing approach links changes to outcomes. In addition, emails with different contents can be tested to determine which changes in content lead to the optimal outcome in the organization's specific external environment. For example, Ansari and Mela (2003) showed that tailored content increased click-through rates by 62%. Sahni et al. (2018) found that adding the email recipient's name to the subject line increased the probability of opening the email by 20% and sales leads by 31%. Testing can also reveal content that makes email ineffective and that thus undermines the communication process. Micheaux (2011) found that those who received emails with an overtly promotional sender address and subject line were less likely to open them. Furthermore, through testing, it is possible to detect changes that do not have any significant benefits. For example, Lewis et al. (2013) found only minor differences in the performance of emails with picture-dominant content compared to emails with text-dominant content.

Before email marketing even existed, traditional direct marketers optimized messages, targeting, and timing to improve the response rates of their campaigns (Stone & Jacobs, 2008). They practiced so-called split run testing, changing one variable at a time (Bell et al., 2006). This method still exists today, often referred to as A/B testing. The financial industry led the way to more advanced testing techniques that allow for the testing of multiple variables with multiple versions (Bell et al., 2006). These multivariate tests reveal not only the main effect of each variable but also the outcome of the interaction between the variables (Box et al., 2005). Both methods are applicable to the testing of email content, and are in daily use in many organizations today (Kohavi et al., 2020; see also Section 3.3.2).

The testing process begins with determining the desired outcome, followed by designing the email with different content and execution tactics. The aim is to guide email recipients through the content and provide them with a reason to complete the desired action (Dawe, 2015). By comparing the results of each email, it is possible to find the version that leads to the optimal result. In this context, digital marketing channels such as email have the advantage of clickstream data, which is an unobtrusive way to collect detailed information about individual responses to marketing stimuli, in an objective, easy, and economical way (Bucklin & Sismeiro, 2009; Järvinen & Karjaluoto, 2015; see also Section 3.2).

A/B testing is now a built-in feature of many marketing email delivery systems. Typically, two or more variations of the content are randomly shown to a sample of email recipients, and statistical analysis is used to determine which content performs better for a given conversion goal. The winning version is then automatically sent to the rest of the recipients. According to the Data & Marketing Association's Marketer email tracker (2020b), 85% of marketers took advantage of testing. However, testing was one of the skills they lacked the most.

In addition to testing, the content of an email can be developed, for example, by following academic literature or industry recommendations. As marketers collect large amounts of consumer data, it can be used to target and tailor emails according to consumer expectations, even to individual recipients (Yun et al., 2020). Yet another option is to ask consumers directly about their preferences. The next section focuses on the different processes that can be used to tailor the content of an email.

2.3 Process of tailoring email marketing

2.3.1 Basic elements of the personalization process

According to the personalization process model of Vesanen and Raulas (2006), tailoring marketing communications is a dynamic process that consists of eight basic interrelated elements, as shown in **Table 2**. Four of the elements are objects that are needed to perform the operations. Objects can also be the results of an operation. Four of the elements are operations that describe actions at the different stages of the process (Vesanen, 2007). Successful execution of personalized marketing requires consideration of each of these elements.

Elements of personalization are associated with several discontinuity points and hurdles related to, for example, permission, data accuracy, creative solutions, and learning about customer responses (Vesanen & Raulas, 2006). By analyzing discontinuity points, the marketer can identify the reason for low performance, such as dissatisfied customers or low ROI (Vesanen & Raulas, 2006).

Table 2. The basic elements of personalization (adapted from Vesanen & Raulas, 2006).

Element	Explanation	Role
Customer	The basis of personalized marketing	Object
Interactions	Collecting data about the customers	Operation
Customer data	Collected through interactions and from external sources	Object
Processing	Transforming data into customer profiles	Operation
Customer profile	Differentiating customers by their preferences and using profiles as the input for customization	Object
Customization	Production of personalized marketing output	Operation
Marketing output	For example, a tailored email (which, in turn, is linked to the content dimension of Pettigrew, 1987)	Object
Delivery	Describing how the personalized marketing output reaches the customer	Operation

When Vesanen and Raulas (2006) created their personalization process model, personalization was mainly done manually. Today, with the use of automation and artificial intelligence, an increasingly large part of the personalization process is performed by algorithms. Zarouali et al. (2022) incorporated the personalization process model into their algorithmic persuasion model. What both models have in common is that the elements are interrelated, customer data is critical to persuasion, processing and customization take place either manually or automatically, and there is a marketing output that is delivered through some channel.

Algorithms are based on the past choices and preferences of individuals and can be thought of as modern tailoring techniques that increase the personal relevance of marketing communications (Zarouali et al., 2022). However, in this dissertation, the specific context in which marketing communication takes place is empowerment. For this reason, the focus of the personalization process is on how customer data is collected during customer interactions. The following sections first conceptualize customer data, an object component of the personalization process, and then interactions, an operation that occurs during the process.

2.3.2 Customer data

Customer-related data, such as clickstream or transactional data, is usually stored and processed in the customer relationship management (CRM) systems of marketers and used to deliver the right message to the right customer at the right time. This customer data can be divided into several different categories.

The OECD (2019) classifies data based on its origin into volunteered, observed, derived, and acquired data. While individuals actively and purposefully provide volunteered data, their role in the other three categories is passive. Observed data is captured implicitly by tracking actions such as email opens and clicks, search terms used, or purchases made. Derived data is created based on data analytics, such as credit scores calculated based on an individual's financial history (OECD, 2019). Acquired data is obtained from third parties, such as data aggregators, who gather it from various platforms and websites using (third-party) cookies, aggregate it with additional sources, and sell it to interested parties (Brinson et al., 2018). In summary, volunteered data is collected explicitly, while observed, derived and acquired data are collected implicitly (Zarouali et al., 2022).

Another manner of categorizing consumer data is based on data ownership. Generally, first-party, second-party, and third-party data are separated (Malthouse et al., 2018; Yun et al., 2020). First-party data is collected, for example, through cookies or online clicks and owned by the marketer. Second-party data is "rented" from another organization that owns the data. For example, marketers can use the data owned by Google when using Google's platform for real-time bidding (Zarouali et al., 2022). Third-party data is purchased from data aggregators that specialize in collecting and combining data but are not directly involved in the primary process (Zarouali et al., 2022). Data collected directly from consumers by marketers is sometimes referred to as zero-party data, or "little data" (Britt, 2020; Gilliland, 2020; Hofacker et al., 2016), as opposed to the large data sets commonly referred to as big data. Zero-party data provides marketers with explicit consumer preferences and can be collected, for example, through questionnaires, quizzes, and polls (Gilliland, 2020; Segment, 2022; Yun et al., 2020). Although this data comes directly from consumers, they typically do not own the data but instead provide it to the marketer in exchange for free services (Spiekermann & Korunovska, 2017) or for a personalized experience (Chandra et al., 2022). Therefore, zero-party data can also be counted as first-party data.

Despite initiatives to develop customer-side equivalents of CRM, such as vendor relationship management (VRM, see e.g., Mitchell et al., 2008) or MyData (e.g., Kopponen et al., 2022), the consumer-centric approach to personal data management is still in its infancy (Lehtiniemi, 2017). The literature mostly deals with consumer data from an organizational perspective, considering it as "the new oil" of the Internet and the new currency of the digital economy (Spiekermann & Korunovska, 2017). Of particular interest here are third-party cookies and data sharing. Third-party cookies track individuals across the Internet and have long been the backbone of digital advertising, creating significant profit opportunities for advertisers, publishers, advertising technology companies, and technology giants such as

Facebook, Google, and Amazon, at the expense of consumer privacy (Segment, 2022).

Pressure against third-party cookies has increased in recent years. Legislators such as the European Union are pushing for new regulations to curb implicit data collection. First introduced in 2002, the Directive on privacy and electronic communications (2002/58/EC), also known as the ePrivacy Directive, regulates the processing of personal data, such as the use of cookies and consent to email marketing (European Union, 2002). Amended in 2006 (Directive 2006/24/EC) and in 2009 (Directive 2009/136/EC), the new ePrivacy Regulation is currently in the final stages of preparation and will complement the General Data Protection Regulation (GDPR) by specifying additional requirements for the processing of personal data (European Union, 2022; González et al., 2020). The proposed regulation will cover cookies and similar tracking technologies, which currently enable personalized communications to consumers. As a result, the value of first-party data, especially explicitly disclosed information, is expected to increase (Segment, 2022).

Both volunteered and observed (or other passively acquired data) can be used to tailor email marketing to individual needs. Tailoring that is based on observed customer data and, for example, predictive technology is commonly referred to as personalization. It is system-initiated and done for the consumer (Sundar & Marathe, 2010). Tailoring emails to individual users is thus based on their preferences, behavior, and context, without the participation of the user.

Another option is to base tailoring on voluntarily provided data. This is also often referred to as personalization. Allowing customers to choose from different options is sometimes referred to as adaptive personalization, while co-creation with customers is defined as collaborative customization (Vesanen, 2007). Some scholars refer to user-initiated, consumer-driven tailoring as customization (Sundar & Marathe, 2010). Typically, customization refers to encouraging users to choose alternatives or actively influence communication to meet their specific needs and preferences. In this way, they are activated to participate in the tailoring process.

Vesanen (2007) points out the lack of common definitions of tailoring, which hinders the development of common knowledge about personalized marketing. However, it is understandable that personalization and customization are used interchangeably because they have overlapping meanings. They both individualize the customer experience, base tailoring on consumer preferences, and aim to create tailored messages. This dissertation adopts the view of Chandra et al. (2022) and Sundar and Marathe (2010), who define only consumer-driven tailoring as customization.

From an operational perspective, customer data is collected through interaction. The next section aims to provide a theoretical rationale for what motivates participation in an interaction and what kind of impact it may have on email marketing outcomes.

2.3.3 Interactions

Interactions with customers allow data to be collected about them. This can be passive, such as clicks, or active, such as filling out preference questionnaires (Vesanen & Raulas, 2006). While the marketing output, such as the content of the email, may end up being the same regardless of the type of data on which it is based, this study suggests that customer involvement in the process has a positive impact on the outcome (conversions).

Active interactions are at the core of empowerment, but there are several other theories that support interactions, as well. Vargo and Lusch's (2004) famous service-dominant logic of marketing combines theories of service exchange, value co-creation, resource integration, value determination, and ecosystems (Vargo & Lusch, 2017). It views the customer as an active, knowledgeable, and valuable operant resource whose role has changed from that of a mere target of offerings to that of an active participant in the entire value creation process (Vargo & Lusch, 2004). As a continuation of this development, conversational and dialogic marketing creates a personalized and interactive customer experience that responds to customers' unique and changing needs (Britt, 2020; Line et al., 2020; Wang, 2021). In this spirit, Bacile et al. (2014) proposed that a service-based strategy, such as co-production, improves consumers' psychological and behavioral responses to marketing communications. They found that the ability to choose the delivery time of a mobile coupon resulted in a high redemption rate. The pioneering practitioner study by Postma and Brokke (2002) found similar results: the ability to choose one's favorite content doubled the click-through rate compared to standard content. The customization effect also increased over time.

The theory of psychological ownership (Pierce et al., 2001) also explains customer engagement and participation in interactions. Psychological ownership refers to the sense of possession or attachment that an individual feels toward an object, idea, person, technology (Kirk et al., 2015), or brand (Chang et al., 2015), even when no legal ownership exists. It is a subjective and emotional experience that includes a sense of power, responsibility, and investment (Fuchs et al., 2010; Harmeling et al., 2017). For example, consumers develop a sense of psychological ownership when they are empowered to contribute to the development of new products (Fuchs et al., 2010). Similarly, Sundar's (2008) agency model of customization suggests that allowing customers to act as sources of information and action leads to a greater sense of ownership and self-agency. Those who experience a high sense of self-agency also perceive the messages they receive as more important and convincing (Kang & Sundar, 2016).

The psychological reactance theory (Brehm, 1966) explains interactions from yet another perspective. Psychological reactance is experienced when something threatens or eliminates people's freedom of behavior. Brinson et al. (2018) studied psychological reactance in the context of personalized marketing, relating it to the privacy concerns of consumers whose personal data is used to target them with promotional messages. According to their research, consumers who received personalized marketing based on voluntarily given first-party data, reported positive attitudes toward the communication. Conversely, although not significant in their study but supported by previous research (e.g., Baek & Morimoto, 2012), consumers who received personalized marketing based on third-party data, reported negative thoughts about the message. Consumers tend to experience psychological reactance when they feel that they are being overly observed by marketers and their freedom to have control over their private information is threatened (Baek & Morimoto, 2012). When the personalization is based on voluntarily provided data, reactance is not triggered (Brinson et al., 2018). Another common way to overcome psychological reactance is to empower consumers to decide whether they want to receive content based on their personal or behavioral data (Brinson et al., 2018).

Both the academic literature and marketing practitioners have found success with passive interactions, as well (Maslowska et al., 2011; Strycharz et al., 2019). A few examples from numerous studies show that expected click-through rates can increase by 62% when email design is tailored based on statistical optimization (Ansari & Mela, 2003), that emailing customers about products they have previously expressed an interest in leads to positive responses (Wattal et al., 2012), and that customers prefer emails tailored in their native language (Leung & Tsou, 2019). At the same time, a number of personalization studies have shown no effect. For example, the personalization experiment by Maslowska et al. (2011), described in Section 2.2.2, showed no significant effect on attention, cognitive activity, attitude, intention, or behavior. The results of the experiment described in Article III indicate that personalization does not lead to better open, conversion, or unsubscribe rates (Hartemo, 2022). Some findings are contradictory. For example, Wattal et al. (2012) found that a personalized greeting led to negative responses, while later studies by Sahni et al. (2018) and Munz et al. (2020) found that adding the recipient's name to the subject line increased the likelihood of opening the email. The explanation may be that customers are nowadays accustomed to marketers using their names (Munz et al., 2020).

2.4 Summary

Following Pettigrew's CCP framework (1987), this dissertation examines the strategic transformation of email marketing to meet the needs and expectations of an empowered consumer. When empowerment is the external context in which the transformation takes place, voluntarily provided data and participation in the communication process leads to relevant email content and improved behavioral outcomes. This further strengthens the trust and commitment of the relationship, leading to even greater participation and more relevant content.

Empirical studies in the original articles validate the reconceptualization of modern email marketing by experimentally testing an empowering email marketing strategy in a real-world setting.

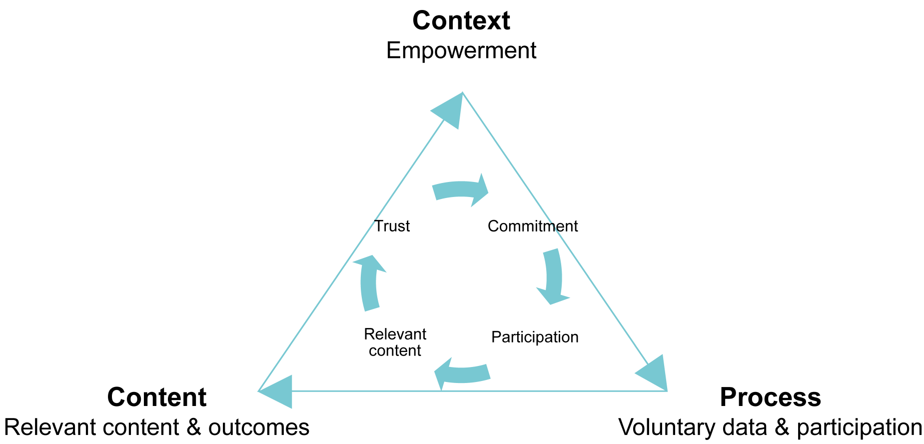

Figure 3. Dimensions of the research, following Pettigrew's CCP framework (1987).

3 Methodology

This chapter presents the ontological and epistemological perspectives of the dissertation, as well as the research methodologies used in the original articles. A summary of the methodologies used for each article can be found in **Table 3**.

Table 3. Methodological aspects of each article.

ARTICLE	METHOD	DATA	MEASURE	ANALYSIS
I	Systematic literature review	Literature on consumer empowerment (54 articles) and email marketing (41)	-	Content analysis
II	Experimental design: controlled between-subject experiment	Clickstream data of 173,286 email recipients of an airline company	OR, CTOR	Multivariate analysis: estimated effects/standard errors, pareto chart, logistic regression
III	Experimental design: controlled longitudinal between-subject experiment	Clickstream data of 1,864 university applicants	OR, CTOR, CR	Cross-tabulation analysis, chi-squared test

3.1 Ontological and epistemological perspectives

Every researcher and every piece of research has some basic assumptions behind them that have an influence on their methodological choices. These are: 1) ontological assumptions about the nature of the social world and how it can be studied, and 2) epistemological assumptions about how knowledge can be acquired (Burrell & Morgan, 1979). In the social sciences, these also include assumptions concerning the relationship between human beings and their environment (Burrell & Morgan, 1979). Different ontologies, epistemologies and models of human nature are likely to lead to different methodologies, or in other words, different conceptions of how the social world can be studied and knowledge obtained.

This dissertation adopts a critical realist perspective (Bhaskar, 2008). Ontologically, critical realism states that there is a reality that exists independently of our knowledge, but it is constructed from our perspectives and experiences (Hoddy, 2019). Therefore, the world can be observed only partially. Epistemologically, critical realism argues that although new knowledge about the social world can be generated through scientific discovery (Hoddy, 2019), it is always historically, locally, and socially determined (Mingers et al., 2013). This means that the researched facts are interpreted differently in different times and contexts (Eriksson & Kovalainen, 2016).

Critical realism is a relatively new approach, placed between positivism and interpretivism, sharing the positivistic assumption of knowing the reality but rejecting its understanding of causality (Easton, 2010). For a critical realist, a causal effect is not about "A is followed by B" but about inferring the process and conditions under which "A causes B" (Zachariadis et al., 2013). Common to interpretivism is the view that understanding social situations requires interpretation (Zachariadis et al., 2013). The views differ in that critical realists believe that not all viewpoints are equally valid, but they must be critically evaluated (Mingers et al., 2013).

The dissertation integrates information systems and marketing research. In recent years, critical realism has gained popularity in both domains, especially in the former (Easton, 2010; Mingers et al., 2013; Simmonds & Gazley, 2018; Wynn & Williams, 2012). According to Zachariadis et al. (2013), critical realism is particularly suitable for the study of information systems, because it is a practice-based research domain that incorporates aspects of both natural sciences and social sciences. Similarly, Simmonds and Gazley (2018) describe marketing as applied and practical, open to a variety of research methods and data sources, *"allowing each to shed light on certain aspects of a complex real-world situation"* (p. 154). Critical realism has also been adopted in several other disciplines, such as sociology, economics, management, linguistics, and media studies (Easton, 2010).

As such, critical realism supports multiple research methods and their combinations (Eriksson & Kovalainen, 2016; Mingers et al., 2013). However, especially in the social sciences, critical realism has not traditionally favored statistical methods (Mingers et al., 2013). Although quantitative measures are used in the dissertation, it is acknowledged that they are subject to external conditions depending on the context. Experiments capture information about actual actions in real decision-making situations. Unobtrusively acquired behavioral data provides valid and reliable knowledge about the phenomena that may be unconscious or where observation may disrupt the situation (Miller & Tsang, 2011). Therefore, it must be acknowledged that the subjective experience of individuals remains somewhat unknown.

The researcher subscribes to Pettigrew's (2012) statement that "truth is the daughter of time," meaning that any research is sensitive to time and context. This dissertation utilizes Pettigrew's (1987) framework, which calls for examining the process of change over time, and relating it to the context in which it occurs, as well as to the content of what is being changed. Pettigrew later developed a research methodology called contextualism (Sminia, 2017), which shares some similarities in scholarly approaches with critical realism. Both recognize the importance of context and history in shaping observable phenomena, and both emphasize the complexity and diversity of the world. However, critical realism assumes that scientific inquiry can uncover objective truths about the world, whereas contextualism assumes that scientific inquiry is inherently subjective and influenced by social and cultural factors.

3.2 Measurement

3.2.1 Measuring the effectiveness of email marketing

Effectiveness of marketing is often measured by return on investment (ROI). Email marketing is superior compared to other online channels in this regard (ANA, 2022; Litmus, 2020), as the cost of producing and distributing emails is minimal. In previous academic research, email has also been successful in terms of purchase frequency and dollar sales (Danaher & Dagger, 2013) and long-term impact (Breuer, Brettel, & Engelen, 2011).

Comparing the effectiveness of email marketing suffers from the fact that the industry lacks a common measurement standard (Bucklin & Sismeiro, 2009; Järvinen, 2016). The diversity of digital analytics alone makes it difficult for organizations to select appropriate metrics (Järvinen, 2016). Furthermore, the relevant metrics depend on the organization's objectives. The literature suggests identifying key performance indicators (KPIs) to measure success against the organization's specific objectives (Kaushik, 2010) or setting overall evaluation criteria (OECs) for the objectives (Kohavi et al., 2020).

In this study, success is measured by consumer behavior. In doing this, the study continues the path signaled by Samuelson (1948) in his Revealed Preference Theory, arguing that consumer preferences can be revealed by observing their purchasing behavior. The basic principle is that when measuring preferences, it is better to measure behavior than to ask for opinions, which can be distorted by the research situation. In email marketing, not only purchasing but also other behaviors can be measured with clickstream data. This data is the information collected about the consumer as they open, read, and respond to an email. Compared to subjective, attitudinal measurement methods such as surveys and interviews, clickstream data is considered objective, standardized, and less vulnerable to response bias (Järvinen & Karjaluoto, 2015). Behavioral data is also relatively easy to communicate to senior management, which is important for measurable marketing (Järvinen & Karjaluoto, 2015). For example, a balanced scorecard approach can be used, although single metrics or weighted combinations of multiple, organization-specific objectives are recommended by Kohavi et al. (2020).

The shortcoming of clickstream data analysis is that it does not explain how recipients actually think and feel about the emails (Breur, 2011; Järvinen & Karjaluoto, 2015). Therefore, combining behavioral data with attitudinal data would provide a more complete picture of email marketing success (Breuer et al., 2011; Järvinen & Karjaluoto, 2015; Merisavo & Raulas, 2004). However, according to the systematic literature review in Article I, this has rarely been the case in email marketing research. Only 4 of the 41 studies examined combined behavioral and attitudinal data: Danaher and Dagger (2013); Micheaux (2011); Park and Lee (2012); and Park et al. (2005). The use of behavioral data alone makes the research process economical and fast. Since this study aims to observe the genuine, unconscious reactions to emails that show empowering aspects, attitudinal measures are not used. Furthermore, behavioral measures are established methods for measuring actions in email marketing (e.g., Czernik et al., 2008; Lewis et al., 2013; Lim et al., 2016; Micheaux, 2011; Rettie, 2002; Sigurdsson et al., 2013).

Consumer behavior data in email marketing is often collected from a number of different sources: the email marketing software or service provider, web analytics services, and data from the organization's other information systems, such as sales or customer relationship management systems (Järvinen & Taiminen, 2016; Kaushik, 2010). This requires expertise and analytical skills in selecting appropriate metrics and analyzing data to gain meaningful insights (Järvinen & Taiminen, 2016). Linking email marketing to sales is a challenge for many organizations due to the lack of alignment between marketing and sales channels (Litmus, 2020). However, it is necessary in order to get a comprehensive picture of email marketing success. Article III expands measurement beyond the results of an email newsletter. An overview of the measures used in the dissertation is shown in **Figure 4**. These measures and the contexts in which they appear are discussed in more detail in the following sections.

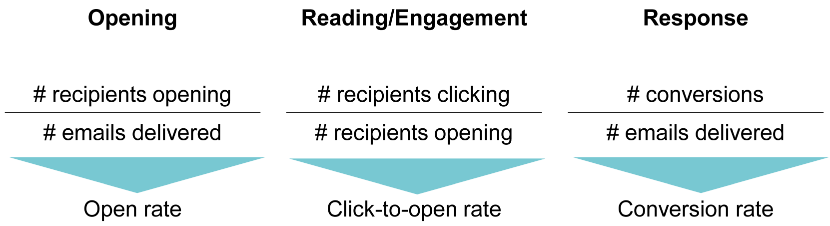

Figure 4. Behavioral metrics of the study.

3.2.2 Chosen measure 1: open rate

The first behavioral outcome of interest in this study is the opening of the email, which can be measured by the open rate (OR) and is an indicator of the recipient's attention (Micheaux, 2011). The decision to open an email is primarily based on the text of the subject field, but the sender information can also influence opening (Micheaux, 2011; Rettie, 2002), as well as textual and visual content, if the preview pane of the email client is in enabled.

Open rate refers to the number of unique opens an email receives relative to delivered emails. In general, an email is considered opened when the embedded web beacon in the email is downloaded, or when a link in the email is clicked. This measure is not without its challenges. For example, recipients who have not enabled images in their emails may open the message without downloading the web beacon, in which case the opening will not be registered. In addition, a popular email client provider (Apple mail) can change their email privacy features to prevent email marketers from seeing recipient's open behavior (White, 2021). However, since 95% of marketers used open rate for measuring their email marketing success in 2020 (Litmus, 2020), the measure is considered appropriate for this dissertation, too.

3.2.3 Chosen measure 2: click-to-open rate

Another objective of email marketing is to persuade the recipient to read the email. Overall design, use of images, and textual content all influence whether the email is interesting enough to result in a click (Czernik et al., 2008; Ellis-Chadwick & Doherty, 2012; Rettie, 2002), which is the second behavioral outcome to be examined in this study, measured by click-to-open rate (CTOR).

CTOR compares the number of unique clicks (number of individuals who clicked on at least one link in an email) to unique opens (number of individuals who opened the email at least once). A commonly used alternative to CTOR is click-through-rate (CTR), which refers to the number of clicks relative to delivered emails. Industry reports indicate that 88% of marketers use CTR, while 69% use CTOR for measurement (Litmus, 2020). Nonetheless, CTOR is used in this study because it allows comparison of emails among groups of recipients of different sizes (Lewis et al., 2013). CTOR also indicates the extent to which the recipients engage with the content, helping to form an understanding of the relevance of the email (Kaushik, 2010; Micheaux, 2011).

Again, it is important to note that some of the outcomes may not be registered. The recipient can read the whole email without clicking and can continue to perform the desired action later by going to the marketer's website, for example, via a search engine.

3.2.4 Chosen measure 3: conversion rate

The third outcome examined in this study is conversion, which is an important metric for most marketers, because it is indicates the business impact of marketing (Yun et al., 2020). In 2020, 60% of marketers used conversion rate (CR) to measure their email marketing (Litmus, 2020).

Conversion is a desired goal defined and set by the marketer, such as a purchase, registration, or filling in a questionnaire. It is typically caused by an action made on the web page linked to the email, which means that marketers need to extend tracking beyond their emails. The challenge in this is that it is not always clear whether the conversion results from the email or some other marketing or business effort (Yun et al., 2020). Mapping the entire customer journey in multichannel settings, as described by Anderl, Becker, et al. (2016) and Anderl, Schumann, et al. (2016), or using a marketing automation system (Järvinen & Taiminen, 2016) provide possible solutions to this problem.

In this dissertation, the conversion rate compares the desired actions (conversions) to the number of emails delivered. Alternatively, conversions can be compared to the number of unique clicks (click-to-conversion rate), which better describes the funnel-shaped progression of the customer journey. However, when conversion measures the number of university applications, as is the case in Article III, delivered emails provide a more realistic comparison. A study place is a high-involvement product that requires careful consideration before selection (Kurian, 2013), so it is unlikely that clicking on an individual email will result in an immediate application.

3.3 Data and analytical techniques

This dissertation consists of a systematic literature review and two different empirical contexts using online controlled experiments as methods. Each of the studies answered one of the research questions, as described in **Table 1**. The studies used an inductive qualitative analysis method (Article I) and two different deductive quantitative analysis methods (Articles II and III). The following sections describe the datasets and analytical techniques used in each of the dissertation articles.

3.3.1 Bibliometric data to define the context dimension

A systematic literature review was used in Article I to select peer-reviewed papers that study email marketing and consumer empowerment. The aim was to define the context in which email marketing operates today. The systematic literature review was chosen because it can provide an understanding of a vast body of information, identify gaps in previous research, and outline potential new research topics (Petticrew & Roberts, 2006). It differs from other types of literature reviews in its scope and rigor, providing a structure that is often lacking in information systems research (Okoli & Schabram, 2011). The literature review provided insight and inspiration for Articles II and III.

Based on the guidelines of Okoli and Schabram (2011) and consistent with other similar reviews (e.g., Brereton et al., 2007; Petticrew & Roberts, 2006), the systematic literature review process consisted of several phases. First, the purpose of the literature review and the protocol for the review were formed. The protocol specified the process, appropriate key terms and databases, inclusion and exclusion criteria, and a design for organizing and presenting the studies. After that, the literature was searched based on this protocol. Articles were selected if they were published in a peer-reviewed journal and contained the key terms in the title, abstract, or keywords. These terms were *empowerment* and *marketing* or *advertising*; *email marketing* and *email advertising*; *marketing communication* and *Internet* and *email*. Email was written both with and without a hyphen. The steps of the filtering process and the number of articles at each stage are shown in **Figure 5**.

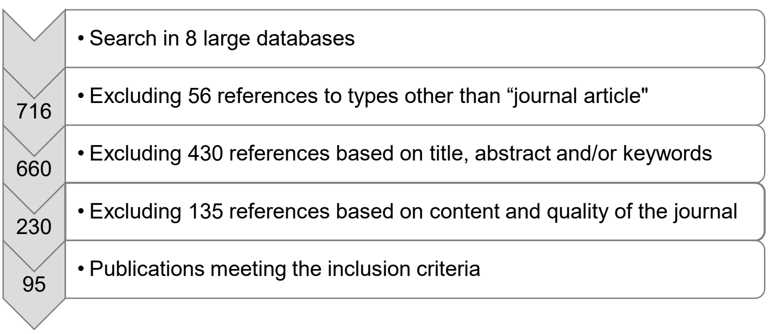

Figure 5. Systematic literature review process (Hartemo, 2016, 215).

After screening the articles and evaluating their quality, 95 articles meeting the inclusion criteria were identified. These were published between 1998 and 2014 and consisted of 54 on consumer empowerment and 41 on email marketing. The following summarizing phase revealed that only one article made some reference to the relationship between the two concepts. However, in order to fulfill the purpose of the study—that is, to understand why, when, and how email marketing can be used to empower consumers—it was necessary to examine the two areas simultaneously. Therefore, the papers were first categorized into ten groups by topic, following the model of Rodriguez et al. (2014). The classification of the literature into these categories was based on content analysis using an inductive approach, which allowed new insights to emerge from the data (Hsieh & Shannon, 2005). The categories were then further grouped according to a four-stage framework, as shown in **Figure 6**, which allowed for the study of the intersection of email marketing and empowerment.

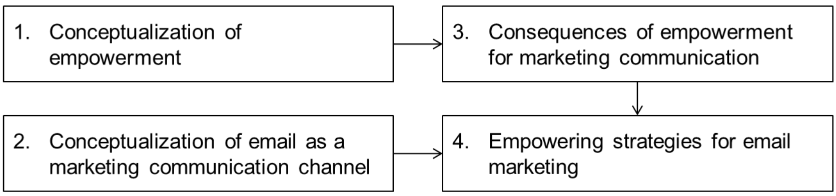

Figure 6. Four-stage framework of connections between email marketing and empowerment (Hartemo, 2016, 218).

In the framework, stages 1 and 2 provide the background and rationale for stages 3 and 4. The third stage answers the question of *why* marketing communication in general, and email in particular, can be used to empower consumers. The fourth stage answers the questions of *when* and *how* email can be used to empower consumers.

At the end of the literature review process, three aspects of empowering email marketing emerged: permission, active participation, and relevance. These findings were used in the following articles.

3.3.2 Experimental data to define the content dimension

Article II used online controlled experiments to test and optimize the content of an email. Controlled experiments were developed at the beginning of the 20th century (Kohavi et al., 2020) and later became familiar to, for example, the medical, financial and manufacturing industries, as well as traditional direct marketing practitioners (Bell et al., 2006; Kohavi et al., 2020). Also known as field experiments, randomized controlled experiments, split tests, A/B tests, and multivariate (MVT) tests, the method is now widely used by online companies such as Airbnb, Amazon, Google, Microsoft, and Netflix (Kohavi et al., 2020). These companies run the experiments at scale on multiple channels, such as websites, desktop and mobile applications, and email (Kohavi et al., 2020).

Controlled experiments can be conducted both before and during email delivery. It has been typical in the direct marketing tradition to fine-tune messages to perform at an optimum level by testing them with sample recipients before sending the message to the final recipient list (Dawe, 2015). Modern technology has accelerated and largely automated these processes, and today, a variety of email marketing software take care of sampling, analyzing the results, and sending the winning design to the recipients after the marketer has sent the newsletter (Schreiber, 2015).

In Article II, a controlled experiment was conducted in a real-life environment, during the sending process, and without automation. The process consisted of changing the content of an email, sending different versions simultaneously, and measuring the impact on response rates using clickstream data. The experiment tested the behavior of consumers receiving regular permission-based email marketing from an airline company. The sampling process was performed by the company, which assigned the 394,800 consumers randomly into eight recipient groups of equal size. During the test, unexpected technical issues occurred that reduced the final number of emails sent to 173,286 and left the final recipient groups unbalanced, particularly in two of the test groups. However, further investigation of power and sample size indicated that the sample size was sufficient to provide accurate statistical results on a 5% significance level.

Eight email versions were created, containing different combinations of subject field texts, main images, and main news texts. These were explanatory, independent variables. Thus, the experiment used a 2 (subject: price vs. benefit) x 2 (image: price vs. location) x 2 (text: price vs. benefit) between-subjects, full-factorial design. Openings and clicks were dependent variables, with values of either 1 or 0, indicating whether there was an activity (1) or not (0). After a two-week follow-up period, the open and click-to-open rates were calculated. The different email versions and their results are described in **Table 4**.

Because each factor-level combination had the same number of runs, the design was orthogonal (Ledolter & Swersey, 2007). Thus, the main effects of the 2^3 factorial design were obtained by summing up the result of each version with either a minus or plus sign, depending on which level of the variable was used, and dividing this sum by four (8 email variations/2 levels=4), as advised by Box et al. (2005, 182). The variables to be varied were the subject field, header image, and header text, which are also labeled A, B and C, as in **Table 4**.

Table 4. Results of the experiments in Article II.

EMAIL	Subject A	Image B	Text C	Interaction effects				Sent	Open	Click
				AB	AC	BC	ABC			
1	-	-	-	+	+	+	-	19,709	28.68%	5.12%
2	+	-	-	-	-	+	+	9,862	29.46%	6.04%
3	-	+	-	-	+	-	+	29,158	29.23%	4.82%
4	+	+	-	+	-	-	-	26,615	32.67%	5.13%
5	-	-	+	+	-	-	-	19,727	28.51%	4.59%
6	+	-	+	-	+	-	-	29,204	29.09%	5.26%
7	-	+	+	-	-	+	-	29,581	28.43%	4.40%
8	+	+	+	+	+	+	+	9,430	32.25%	4.91%
Total								**173,286**		
Mean								**21,661**	**29.63%**	**5.02%**

For example, the effect of the subject field (column A) on the open rate is obtained by calculating A = (-28.68% + 29.46% - 29.23% + 32.67% - 28.51% + 29.09% - 28.43% + 32.25%) /4 = 2.158%. The interaction effects, meaning the effects of the variables on each other, were calculated in the same way and are indicated in **Table 4** by the letter combinations AB, AC, BC, and ABC. The minus or plus sign in each column of interactions is obtained by multiplying the signs of the variables concerned.

The results of the main and interaction effects can be calculated using a spreadsheet or even manually, but more commonly, they are obtained by analysis of variance (ANOVA). However, Box et al. (2005, 188) point out that ANOVA unnecessarily complicates the interpretation of results, and they discourage its use. Instead, the analysis in Article II focused on examining the ratio between the magnitude of the effect and the standard error (Box et al., 2005). The aim was to determine whether the differences between the levels of the variable p+ and p- were statistically significant (Ledolter & Swersey, 2007). The standard deviation was

Equation 1 $$\text{Standard error(effect)} = \sqrt{4\,\frac{\overline{p}(1-\overline{p})}{N}},$$

where $\overline{p}$ = overall success proportion as percentages, averaged over all runs, and N = delivered (open rate) or opened (CTOR) (Ledolter & Swersey, 2007). As the experiment design was unbalanced, the results were further analyzed using logistic regression, as advised by Ledolter and Swersey (2007). The estimated effect was determined to be statistically significant at the 5% level if the estimated effect ($\overline{p}_{+} - \overline{p}_{-}$) had an absolute value greater than 1.96 times its standard error (effect). For greater certainty, 1.96 was substituted with 2 in the analysis.

The main and interaction effects were ordered in a pareto chart from largest to smallest in absolute values (cf. Bell et al., 2006). The sign of each effect indicated which of the levels of the variable were better: for positive effects, the version with a plus sign (+) increased the response rate, and for negative effects, the version with a minus sign (-) increased the response rate, meaning that the control version was better than the test version. In the diagram, statistically significant results were separated by a line so that the significant results remained above the line (Ledolter & Swersey, 2007). The pareto charts of the main and interaction effects are shown in Figures 3 and 5 in Article II (Hartemo et al., 2016, 9-10).

Interpreting interaction effects is more challenging than interpreting main effects, because the effect of variable A on the outcome may differ depending on variable B (and vice versa), and the separate effect of A and B on the outcome cannot therefore be assessed without further examination (Bell, 2003). It is recommended to illustrate the interactions using a diagram, which describes the interdependence of variables more clearly than mere numbers (Bell, 2003). Variables have an effect on each other when the lines on the diagram are not parallel (Ledolter & Swersey, 2007). The diagrams of the interaction effects are shown in Figures 4 and 6 in Article II (Hartemo et al., 2016, 10-11).

The analysis showed that one combination maximized the OR (version 4), but another one maximized the CTOR (version 2). Using multivariate analysis, as suggested by Box et al. (2005) and Ledolter and Swersey (2007), it was possible to find an optimal email design, which was none of the eight versions tested.

3.3.3 Experimental data to define the process dimension

Article III studied permission-based email marketing sent to university applicants. The controlled between-subject experiments examined the effect of a random allocation of email recipients in three different conditions: control, personalized, or customized. These variables describing the process of tailoring were also the independent variables in all of the experiments. Dependent variables got either a value of 1 (response) or 0 (no response) and consisted of the number of delivered, opened, clicked, and unsubscribed emails, complemented by the number of applications. All email-related data were obtained from the email marketing software. The number of applications was obtained from the application system of the collaborating university.

The university provided the names of the 1,864 applicants, who were randomly assigned to the three conditions. The applicants in the customized condition were asked to complete a short online survey, and the data of the applicants in the personalized condition were classified by the researcher. Based on these procedures, the applicants were further divided into subgroups based on their preferred field of study (technology, business, health care and social services, or combinations thereof) and/or the level of studies (bachelor/master). Additionally, a control group was formed to serve as a baseline (Vargas et al., 2017).

In the first experiment, eight different email versions were created, in which the subject field, the main image, and the text in the email were tailored based on the field of study of the applicant. The control group received a non-tailored version of the email. The personalized and customized emails were identical but sent separately in order to determine the effect of the different tailoring processes. The emails and the conditions under which they were sent are marked with a + sign in **Table 5**.

In the second experiment, three different emails were created. In these, the subject field and two pieces of news and their images were tailored based on the applicant's level of studies. The third experiment consisted of 13 different emails, tailored by the field of study and the level of study.

Table 5. Emails in the three longitudinal experiments.

EMAILS IN EXPERIMENT 1	CONTROL	PERSONALIZED	CUSTOMIZED
1.0 General	+	-	-
1.1 Tech	-	+	+
1.2 Business	-	+	+
1.3 Health	-	+	+
1.4 Tech & business	-	-	+
1.5 Business & health	-	-	+
1.6 Health & tech	-	-	+
1.7 Tech & business & health	-	-	+

EMAILS IN EXPERIMENT 2	CONTROL	PERSONALIZED	CUSTOMIZED
2.0 General	+	-	-
2.1 Bachelor	-	+	+
2.2 Master	-	+	+

EMAILS IN EXPERIMENT 3	CONTROL	PERSONALIZED	CUSTOMIZED
3.0 General	+	-	-
3.1 Tech bachelor	-	+	+
3.2 Tech master	-	+	-
3.3 Business bachelor	-	+	+
3.4 Business master	-	+	+
3.5 Health bachelor	-	+	+
3.6 Health master	-	+	+
3.7 Tech & business bachelor	-	-	+
3.8 Tech & business master	-	-	+
3.9 Business & health bachelor	-	-	+
3.10 Business & health master	-	-	+
3.11 Health & tech bachelor	-	-	+
3.12 Tech & business & health bachelor	-	-	+

The open rate and click-to-open rate in each experiment were documented after two weeks, and the conversion rate (applications) was calculated after the application period in question had ended. The results were evaluated at an aggregated level in the analysis, rather than analyzing each condition in each experiment separately. The aggregated results are shown in **Table 6** (the condition-level results are shown in Table 2 in Article III).

Table 6. Aggregated results of the experiments in Article III.

AGRREGATED RESULTS	OR	CTOR	CR
Control condition	54.9%	17.8%	14.5%
Customized	70.2%	35.5%	19.9%
Personalized	51.0%	20.5%	14.4%

The customized version proved to be the most efficient for all three metrics. Interestingly, the personalized version lost to the control version in both open rate and conversion rate but performed better in click-to-open rate. The analysis was based on cross-tabulation. The statistical significance of the results was calculated using a chi-squared test. The results of the chi-squared test showed statistically significant differences between the customized and personalized conditions for all metrics (OR $X^2=41.44$, $p<.001$, CTOR $X^2=24.18$, $p<.001$, CR $X^2=6.71$, $p<.01$). The

OR, CTOR, and CR were significantly higher (37.7%, 73.2%, and 38.2%, respectively) in the customized condition compared to the personalized condition. Compared to the control condition, the OR of the customized condition was 27.9% higher, the CTOR was 99.4% higher, and the CR was 37.2% higher. The results indicate that the differences are due to the activation of the recipients, so it can be concluded that the process of tailoring has an effect on the outcome.

3.4 Research ethics

The experiments in this dissertation were conducted on real people in real-life situations. Therefore, there is a particular need to evaluate research ethics. Specifically, data collection and data management are issues to be considered, as potentially sensitive personal data is involved.

The research followed the principle of minimization, aiming to cause no additional harm to the participants beyond what they are exposed to in their normal lives (The British Psychological Society, 2021a). Participants received the same information with the same benefits in the emails regardless of which version they were exposed to; only the wording and images in the emails were changed. In the study of Article III, participants in the activated group received one more email than participants in the other two groups, so the number of emails was slightly higher. Potential harm was caused to those email marketing subscribers of the airline company, who did not receive their weekly promotional email due to the delivery errors described in Article II. This harm can also be considered very low.

Only necessary data about the participant’s actions were collected and analyzed, mostly in aggregate form. Individual participants were not observed as they opened the emails, clicked on the links, or unsubscribed; instead, data that *represented* these behaviors were analyzed (Meyer, 2018, emphasis in orginal). However, in order to connect opening and clicking behaviors to conversion—namely, an application to the university in Article III—it was necessary to identify the participant. The participant's email address was used as an identifier. In addition to the email, only data about the preferred application options and the applicant's first language were used. All the other information about the applicants, based on their enrollment in the admissions register, was deleted at an early stage before the experiments started. Only aggregated data was used in published articles. A research permit was obtained from the case university prior to the research.

Special care was taken to ensure data confidentiality. The limited participant information described above was stored in an Excel file on the researcher’s personal, password-protected user drive on the university server. In addition to the university/airline personnel who provided the data, only the researcher had access to the participant information. In the event that the data is later shared publicly, there is a version of the Excel file in which the participant's email addresses are anonymized.

The use of unencrypted email and an online email marketing provider is another potential threat to confidentiality. However, this has been taken into account in the privacy notices of the case organizations, which state that 1) the processing of personal data of private individuals is based on consent, and that 2) an agreement has been made with technical service providers according to which the parties act as personal data processors.

Issues of transparency, voluntariness, and withdrawal of participants raise some ethical concerns in this study. Getting informed consent means that participants agree to participate in the study freely and voluntarily, having been given "*sufficient information about risks and benefits, the process, any alternative options, and what data is being gathered and how it is handled"* (Kohavi et al., 2020, 120). As is typical of Internet-mediated research, this study also involved acquisition of data about individuals without any physical presence (The British Psychological Society, 2021b). This allows for unobtrusive observation of which participants may not be aware. After careful consideration, informed consent was not obtained for this study. In Article III, the decision was made after discussing the topic with the participating university in connection with the application for research permission. Instead, the emails included a link to the organization's stakeholder privacy notice, stating that personal information will be used for communications development and related research. The justification for this approach was that it would ensure the collection of real, unbiased behavioral data. Therefore, the scientific value was deemed to justify undisclosed observation (The British Psychological Society, 2021b). This practice is common in online controlled experiments (Meyer, 2018), and it involves only very low potential harm to participants (Kohavi et al., 2020). However, it must be acknowledged that individuals did not have the opportunity to choose to participate or to withdraw from this study.

4 Summary of the Articles

4.1 Article I

The first sub-study, published in the *Journal of Research in Interactive Marketing*, used consumer empowerment as a lens for understanding the context of contemporary email marketing. The premise was that a consumer empowerment approach would enable new directions for email marketing, which at the time of the study was suffering from declining acceptance, performance, and deliverability. The aim of the study was to clarify why, when, and how email marketing can be used to empower consumers. Contrary to the more common perspective (the marketer), the focus was on the individual consumer's resources.

A systematic literature review examined 95 scholarly articles related to email marketing and consumer empowerment. Although none of the studied papers concentrated on the intersection of the two concepts, connections between them were found. A four-stage framework described these connections (see **Figure 6**), first conceptualizing both empowerment and email as a marketing communication channel, then describing the consequences of empowerment for marketing communication, and finally providing empowering strategies for email marketing. Opposing views were also observed: empowerment can be factitious, not beneficial to the consumer, or determined and controlled by the marketer.

The synthesis of the previous literature indicated that there are three ways to use email marketing to empower consumers: 1) by obtaining permission before sending the email, 2) by making consumers active participants in the communication process, and 3) by making emails relevant to recipients. By updating email marketing strategies according to these suggestions, email has the opportunity to become an active, interactive, and personalized communication channel that meets the preferences of today's consumer.

As intended, the insights gained from the literature review allowed for the presentation of a number of future email marketing research topics. Since the majority of prior empowerment research had been conceptual in nature, empirical research was emphasized in the suggestions. Five of the potential areas of research were related to empowering strategies for email marketing: relevance, activating consumers, or the effect of psychological factors on customer response.

The following articles built on these suggestions. Article II studied how email newsletter content influences consumer behavior by developing a model for testing and defining the metrics to be used in evaluating the success. Article III examined the process of email marketing, concentrating on consumer data and the co-production approach.

4.2 Article II

The second sub-study, published in the *Journal of Electronic Commerce in Organisations*, provided a model for testing marketing email content. The model defined the response process of an email marketing recipient, the clickstream metrics that measure the recipient's progress through the process, and the design-related factors that influence the response. The article also explained how controlled experiments can be used to optimize email marketing. The aim was to demonstrate ways to improve relatively modest email marketing response rates.

The article synthesized previous scholarly literature, stating that the response process of email marketing progresses linearly, so that each stage must be successfully completed before moving on to the next (Vriens et al., 1998). This funnel-shaped progression consists of receiving, opening, clicking, and responding to the email. Progress can be measured by attitudinal data or behavioral clickstream data: delivery rate, open rate, click-through rate, and conversion rate. The advantage of clickstream data is that it can be collected unobtrusively, immediately, economically, and objectively in a real decision-making situation (Bucklin & Sismeiro, 2009). In email marketing, clickstream data can be used in A/B testing or multivariate testing prior to sending a newsletter. Testing helps marketers to optimize their email content so that it yields the desired response.

An experimental field study evaluated the model by testing emails sent by a European airline company. The receiving and responding phases were excluded from the empirical study because the focus was on the content of the email newsletter. The study found that the subject field and the main image influence the open rate. The subject field, the main image, and the main news text affect the click-through rate. Through multivariate analysis, an optimal combination was found, in which a concrete benefit in the email subject field was coupled with a clearly stated price in a visually appealing location image, and the main news text was relatively price oriented. The airline company was able to use the recommendation in its subsequent emails to achieve better results. Although the differences in response rates were small, examples from the technology industry have shown that even tiny changes can have a significant financial impact (Kohavi et al., 2020). The study also confirmed that the model presented can be used to test email marketing.

4.3 Article III

The third sub-study, published in the *Journal of Research in Interactive Marketing*, examined volunteered data: how it affects the response and unsubscribe rates of email marketing to consumers. Four hypotheses were developed from the perspective of consumer empowerment, in which proactively shared volunteered data changes the role of the consumer from a passive target to an active participant in the relationship, to a co-creator of value (Line et al., 2020; Lusch & Vargo, 2009). Based on the theory of psychological ownership (Kirk et al., 2015), it was expected that consumers would response more favorably when asked to participate in the process of customization. By asking for and using volunteered data, the consumer experience becomes customized and interactive (Wang, 2021), as well as empowering (Prahalad & Ramaswamy, 2004), ensuring relevant email content. In the study, it was postulated that emails with empowering aspects (permission, active participation, relevance) would lead to behavioral outcomes that outperform non-empowering emails. Thus, the study tested the aspects of empowering email marketing that emerged from the systematic literature review in Article I.

The process of tailoring was manipulated in three longitudinal field experiments conducted with 1,864 university applicants. Customized marketing emails based on volunteered data (activated condition) were compared to emails that were personalized based on observed data (observed condition), and to emails without any tailoring (control condition). The response of the three conditions was measured using behavioral data: open rate (OR), click-to-open rate (CTOR) and conversion rate (CR). Unsubscribe rates were also monitored. Article II had suggested using these metrics when testing email marketing.

Differences in behavioral outcomes were observed. At the aggregate level, the activated (customized) condition was significantly more effective than the two other conditions in terms of the OR, CTOR and CR. Unsubscribe rates were highest in activated (customized) condition and lowest in control condition, but the difference was not significant (x^2=2.24, p<.13). Since the emails in each experiment were sent at the same time, with the research subjects randomly assigned to groups, and the contents of the activated (customized) and observed (personalized) emails were similar, with the only difference being the process of tailoring, it was reasoned that the differences were due to the activation of the recipients. The OR, CTOR and CR were notably higher (37.7%, 73.2%, and 38.2%, respectively) in the activated condition, compared to the observed condition.

Interestingly, the personalization of the email content led to a better outcome for only one metric, clicks, compared to the non-tailored control email. Compared to the control condition, the OR of the observed condition was 7.6% lower, the CTOR was 15.2% higher, and the CR was 0.7% lower. This finding contradicts the randomized field experiments of Sahni et al. (2018) and Munz et al. (2020), but it is consistent with the study by Ansari and Mela (2003), in which personalization increased the CTOR.

In summary, the results of Article III suggest that marketers should use volunteered data and make consumers active participants in the communication process, as emails with empowering aspects led to outcomes that mostly outperformed non-empowering emails. Given the volume of email marketing, even a small increase in response rates can significantly increase the returns for the marketers. More importantly, activation can change consumers' perception of email marketing from irritating and irrelevant to engaging and empowering.

The following chapter discusses the findings in relation to the research questions and explains how they contribute to existing knowledge.

5 Summary and Conclusions

5.1 Summary of the findings

Pettigrew's seminal work (1987) emphasized that any change process is contextual (Sminia & de Rond, 2012). In order to analyze a given situation, one must consider not only the current behavior, but also the context in which the behavior occurs, as well as the historical antecedents (Pettigrew, 2012). This dissertation attempts to follow his advice and examine modern email marketing in light of the interaction of context, content, and process.

The first research question (RQ1), addressed in Article I, asked: *How are changing consumer demands affecting email marketing?* This corresponded to the context dimension of Pettigrew's (1987) framework and explained why email marketing requirements have changed.

To clarify the context, the first sub-study examined the expectations and needs of today's consumer with regard to marketing in general and email marketing in particular. Empowerment was used as a lens through which to understand the context. The research revealed that marketing has evolved through artisanal production and the industrial revolution to the service economy and further to the information revolution, and it now faces an ever-increasing demand for interactivity between different stakeholders on a global scale (Berthon et al., 2000; Day & Montgomery, 1999; Wang, 2021). Consequently, the marketing environment has become more complex, and past marketing strategies such as first-mover advantage or regulatory protection are being replaced by the ownership and management of information (Berthon et al., 2000). The information revolution has empowered consumers, making them knowledgeable and well-informed (Pires et al., 2006), has equipped them with network-based and crowd-based power (Labrecque et al., 2013), and has shifted power from marketers to consumers. Consumers now expect to receive relevant, permission-based emails and to be actively engaged in the communication process.

The second research question (RQ2), addressed in Article II, asked: *How can we measure the impact of content changes on email marketing recipient behavior and optimize outcome?* This corresponded to the content dimension of Pettigrew's (1987)

CCP framework and explained the elements of an email and the results of changing them.

The second sub-study concentrated on the content dimension. The underlying idea was that controlled testing could simulate a "strategic change in the organization." Through this, it was investigated what effect changes in the content of a newsletter have on the results of emails. Specifically, Article II developed a model for testing the content of email newsletters and applied this model to an experimental field study. The results indicate that changes in the email content (in this case, the title, main image, and text) affect the number of opens and clicks. In the real-world experiment, the content of the email was modified to achieve the desired outcome. Multivariate testing revealed that in travel marketing, a concrete benefit in the e-mail subject field, content in which a clearly communicated price is combined with a visually appealing image of the location, and relatively price-oriented text resulted in higher open and click rates.

The third research question (RQ3), addressed in Article III, asked: *How does voluntary data affect email marketing conversions?* This corresponded to the process dimension of Pettigrew's (1987) framework and explained how the process of tailoring the content of an email affects the outcomes.

The third sub-study combined the context (why) and content (what) aspects of email marketing with the process (how) perspective to complete the picture of a contemporary, empowering email marketing strategy. During the longitudinal study, it became evident that participation helped improve the performance of marketing emails. Interestingly, the study also revealed that personalization based on observed data did not result in better open, conversion or unsubscribe rates than the control condition.

The goal of the research was to reconceptualize email marketing in line with the expectations of modern, empowered consumers. Section 2.4 of the Conceptual and theoretical foundations summarizes the findings: When empowerment is the external context in which the transformation takes place, voluntarily provided data and participation in the communication process lead to relevant email content and improved behavioral outcomes. This further strengthens the trust and commitment of the relationship, leading to increased participation and more relevant content.

The purpose of the research was to explore an empowering email marketing strategy that marketers can use for effective, modern email marketing. The main research question was *What are the implications of an organization's adoption of an empowering email marketing strategy?* The answer was found through the three sub-questions outlined above. This study suggests that adopting an empowering email marketing strategy requires advanced first-party data management (or "zero-party," as mentioned in Section 2.3.2), which enables interaction in the form of active, two-way communication with customers. Email marketing should be based on permission, and the content of emails should be tailored to the preferences of the individual recipients, but by directly asking about their preferences rather than inferring them from observed data. According to the study's empirical findings, the content of the newsletter matters: relevant content and active engagement improve behavioral email marketing results (open rates, click-to-open rates, and conversion rates). The study also recommends testing email content in the marketer's own operational environment. In short, empowering email marketing is tailored *with* consumers, not just *for* consumers.

5.2 Contribution to theory

The results of this dissertation provide a theoretical contribution divided into three parts that both support and advance the theory. First, it describes the empowerment perspective and its implications for a modern email marketing strategy. Second, it discusses the two alternatives for tailoring, personalization and customization, and their impact on email marketing performance. Third, it updates the concept of controlled experiments and optimization in marketing.

The first theoretical contribution of the dissertation is the conceptual transformation of email marketing from one-way persuasive communication without active consumer participation to empowering, two-way communication. This shift is driven by the Internet-enabled changes in the knowledge and skills of consumers, which require marketers to make consumers active participants in the communication process. This conceptual shift supports the service-dominant logic of Vargo and Lusch (2004), the theory of psychological ownership of Pierce et al. (2001), and Sundar's (2008) agency model of customization, in each of which participation is an important element of effective marketing communication. In addition, the empowering email marketing strategy presented in the dissertation advances the commitment-trust theory of Morgan and Hunt (1994), suggesting that increasing empowerment creates a positive cycle, in which trust is increased, which contributes to commitment, which increases participation, which leads to relevant content, which improves the behavioral outcomes of marketing communication. In doing this, the study supports the findings of Bao and Wang (2021) by adding a behavioral outcome element to the cycle.

Relatedly, the second theoretical contribution advances the personalization literature with the empowerment approach. In the context of empowerment, it is not enough to achieve relevant content simply through system-initiated personalization; customer participation is also required. Consequently, an empowering email strategy is participatory in the sense that tailoring is initiated by the customer and based on volunteered data. This approach is beneficial in terms of behavioral marketing outcomes such as opening, clicking, and responding to marketing communications.

Thus, this study links the type of customer data and the interactions during which the data is collected to outcomes. Although the study did not use attitudinal measures, previous research supports the behavioral findings: Brinson et al. (2018) found that consumers who received personalized marketing based on voluntarily provided first-party data reported positive attitudes toward the communication, while Baek and Morimoto (2012) showed that the use of third-party data produced negative attitudes toward the communication.

The third theoretical contribution relates to controlled experiments and optimization of the marketing output. In addition to testing and optimizing marketing content, timing, or related executional tactics, this study shows that actions, reactions, and interactions also provide opportunities for optimization. Using Pettigrew's framework (1987) as method theory (Lukka & Vinnari, 2014) revealed this opportunity. This highlights that although the framework originates from management studies, it also provides a new perspective for the study of marketing communication. At the same time, the research contributes to method theory by extending its application to a new domain.

5.3 Managerial implications

This dissertation calls for the activation of the interactive capabilities of interactive media such as email. Active, interactive, and customized communication meets the preferences of an empowered consumer and, as empirically demonstrated, unleashes the full potential of computer-mediated communication. As an average of 76.5 emails are sent per day per person (Tankovska, 2021), with up to half of those emails being marketing messages, of which approximately five emails are considered useful (Data & Marketing Association, 2020a), marketers have room for improvement. As shown in Article III, an empowering, interactive email marketing strategy improved the conversion rate by 37.2–38.2%, which indicates favorable attitudes of consumers and can have a significant impact on revenue for marketers (Kohavi et al., 2020).

The dissertation distills an empowering email marketing strategy into three factors: sending only permission-based emails, engaging consumers in the communication process, and making emails relevant to them. In doing this, it provides an easily applicable insight into email marketing, bridging the gap between academia and practice.

The research also encourages marketers to test email communications to understand what kind of content recipients find interesting and relevant enough to generate the desired response. Testing also reveals content that makes an email ineffective and even leads to it being classified as spam, which in turn affects response rates. The model for testing marketing email content provides another easy-to-understand contribution to practice, helping those marketers who struggle with the skills of testing (Data & Marketing Association, 2020b).

Finally, increased privacy regulation threatens the use of passive consumer data, especially that based on third-party cookies. As a result, the importance of explicitly disclosed first-party (or “zero-party”) data is expected to increase. This dissertation provides insight into a privacy-focused approach: respecting subscribers’ data and privacy by being transparent about data collection and use.

5.4 Quality of the study and avenues for future research

A piece of research can be considered successful if it provides reliable answers to the research questions (Heikkilä, 2014). In terms of validity, a good piece of research measures what it intends to measure and accurately represents the phenomenon under investigation (Heikkilä, 2014). This study found answers to the research questions and the hypotheses of the original articles. The internal validity of the results was ensured by following the framework created by the previous literature. The results of the experiments, the analysis, methods, and tools used were reported so that the study could be repeated if necessary.

Reliability refers to the accuracy and non-randomness of the results (Heikkilä, 2014). In the experiments in the original articles, a sufficiently large sample of email recipients was obtained, the resulting response rates were in line with industry averages, and the effects of variables found to be significant were large enough that they could not easily be explained by chance. However, errors can also occur during data collection, entry, and processing (Heikkilä, 2014). The biggest problems in this study occurred in the data collection for Article II: sampling was not controlled, but the recipient groups reported by the airline were assumed to be representative; a sending error may have affected the results; and as the measures were extracted from different systems, the data may not be consistent. Despite the above, the overall results of the study can be considered non-random and therefore reliable.

There are several limitations in the dissertation that open new avenues for research. First, in interpreting the results of the experiments, the study did not consider such contextual factors as the organization’s reputation or other marketing activities. Because the experiments were conducted in a European context, it is not certain that the results would apply to a different culture or to different products or services. For example, it is possible that consumers would not find the increased effort of participation worthwhile for low-involvement products. It is also important to note that the optimal implementation of email marketing is always company-, industry-, and case-specific, so more research in different settings is needed before the results can be generalized. This learning-by-doing approach is also emphasized by Pettigrew (2012).

The second limitation relates to the use of just behavioral data in the analysis. Although controlled experiments are a reliable method of identifying causal relationships (Vargas et al., 2017), and the data from the experiments show that both optimizing an email and activating recipients increase the response, the mechanism behind this should be explored in more detail. That is, the research cannot link the behaviors to consumers' deeper feelings and attitudes toward email marketing communication. If supplemented with attitudinal data through a survey or interview, one could learn more about why activation leads to better outcomes or whether attitudes correlate with behavioral outcomes. For example, differences in consumers' information-seeking or self-identity motivations may be the underlying mechanism (Qin, 2020), in addition to psychological ownership. This might be worth studying in the future.

Third, Article III examined tailoring based on rather trivial preferences (the field of study and the type of content in which applicants were interested). There are several other, possibly more relevant, preferences for tailoring that should be examined. A multivariate analysis might also have revealed interaction effects of different content elements of the emails.

As Pettigrew (2012, 1311) pointed out, the key to understanding the results of research is their interconnectedness; *"no single factor is sufficient to explain variability in performance."* According to him, successful organizations pay attention to 1) constant environmental assessment, 2) change management, 3) linking operational and strategic change, 4) managing human resources, and 5) managing coherence in the overall process of competition and change. The use of his framework offers several possibilities for further studies, for example, related to the use of artificial intelligence in marketing communications. Some examples include automated content creation to generate new, unique, and relevant content for emails based on personal preferences, and the use of trigger-based automated emails to deliver real-time personalized experiences at scale. All in all, there is no reason to abandon email marketing just because new, more interesting interactive marketing practices have emerged alongside it. This research shows that email marketing has a strong future if it continues to evolve as consumer expectations change.

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