

Relationship Marketing in 2015: A Delphi Approach

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Over the past twenty years, relationship marketing has represented a renaissance in marketing and even a paradigmatic change according to some. The shift has had uncertain effects, however, and its applications have faced some serious challenges. Questions are being asked about the future of relationship marketing by both academics and businesspersons. To answer these questions, we have devised a Delphi-type predictive survey of twelve European marketing experts, with the aim of producing one view of potential changes that may occur by the year 2015. The present paper categorises this view into four major themes. It also details the managerial implications of one of the themes based on the following key points: “the experience at the heart of relational approaches”; “new data generation”; and “working together with communities”.

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Introduction

Relationship marketing or RM, the loosest and broadest definition of which is the sum total of marketing approaches focusing on the relationship between a business, its customers and its different stakeholders, came to the forefront of the marketing scene two decades ago. Several years later, RM had to share the spotlight with CRM, Customer Relationship Management, which is “the outcome of the continuing evolution and integration of marketing ideas and newly available data, technologies and organizations forms” (Boulding *et al.*, 2005, p. 156). The advent of RM approaches marks a considerable

change in the way marketing is considered and implemented. This change is still ongoing, however, with many managers questioning the future of these approaches. To apprehend an outline of RM’s future, we have set up a research programme revolving around the Delphi method. In the present article, we begin by detailing our research process before going on to summarize our main findings as regards RM representations in the year 2015. We finish with a discussion of three key points that are highly relevant to future management.

Unanswered Questions

“In the two last decades, practitioners and academics have focused increasingly on how firms relate to their markets. This has resulted in the emergence of a sub-discipline of marketing referred to as relationship marketing” (Brodie *et al.*, 2003, p. 5). Although it can be claimed that in some (and possibly many) cases relationship marketing has been nothing more than a terminological innovation that Berry introduced (1983) to describe a long-established and well-known practice (Palmer, 2002), it is undeniable that over the past 20 years, “RM was probably the major trend in marketing and certainly the major (and arguably the most controversial) talking point in business management” (Egan, 2003, p. 145). Based on Berry’s idea (1983) and related academic work (Hakansson, 1982), the notion of building relationships was expanded during the 1980’s to encompass different areas, including industrial buyer-seller relationships (Dwyer *et al.*, 1987). During the 1990’s, other analysts adopted the idea of building relationships (Boulding *et al.*, 2005) and turned it into a managerial practice, i.e. relationship marketing. Today, however, the results of the rise of relationship

marketing are mixed: no single approach has been adopted and the risks are high that a schism will take place (Coviello *et al.*, 1997; Egan, 2003). Many businesses have adopted relationship marketing without paying attention to the way they generate value for the customer (Ballantyne, 2004a,b), to customers' wishes (Fournier *et al.*, 1998) or to the contingencies of different consumption situations (Grönroos, 2004). The question of the relationships' return on investment (or the return on relationship [ROR]) remains unclear (Gummesson, 2004), as does the measurement of the value created with and for the customer (Ballantyne *et al.*, 2003). More generally, relationship marketing appears to have suffered from IT investments that are often disproportionate to the aims of the relational approach (Hetzl, 2004).

Today, relationship marketing is one of the most widely debated practices in marketing, as witnessed by the number of special issues of academic and business magazines devoted to this topic. At the same time, it is one of the more controversial subjects, one whose future is harder to predict than any other. Articles on this topic have appeared in recent special issues published by the *Journal of Business and Industrial Marketing (Pathways Less Travelled To Value Creation*, Vol. 19, No. 2, 2004, which followed the 2nd WWW Conference on Relationship Marketing) and by the magazine *Marketing Theory (Relationship Marketing*, Vol. 3, No. 1, 2003, which followed the 10th International Colloquium in Relationship Marketing). Note also the first issue of the new *Journal of Relationship Marketing* (Vol. 1, No. 1, 2002). What we are witnessing is the fact that many leading authors in this sub-discipline have started to express doubts, raise questions and throw up challenges for the future. The titles of many articles indicate that there is hope for a better future for relationship marketing, provided that "pathways less travelled" are used (Ballantyne, 2004a); the "dialogue" becomes real (Grönroos, 2004); and "divergence" dies down (Egan, 2003). In view of the very slight optimism about the future of relationship marketing and the much heralded desire of businesses to recoup something from the investments they have made in this area (Rigby *et al.*, 2002), it appears crucial from both an academic and a managerial perspective that we be able to devise a general profile encompassing relationship marketing's medium-term outlook, possibilities and challenges. Hence our development of a research programme designed to "Foresee relationship marketing in the year 2015".

To produce a broad, scientific but non-journalistic outline of relationship marketing in 2015, we have designed a research programme consisting of several phases, each of which included strict, non-intuitive choices. This design is grounded in a Delphi method and follows in the wake of a recent survey on supply management strategies for the future (Ogden *et al.*, 2005). It was deliberately designed as a European project, both to transcend national representations

and also to structure a specifically European vision of relationship marketing. By resorting to the Delphi method in this study, we are providing a framework for communications between participants who despite coming from different professional and cultural circles are all focused on what is a hotly debated marketing topic. It was important to work with a group of partners that was not only heterogeneous but geographically diffuse. The research began in mid-2004 and ended in early 2006.

A Delphi Approach

The Delphi method was first developed for the field of technological forecasting, in the US, in the early 1960's by Norman Dalkey (Rand Corporation) and Olaf Helmer (Institute for the Future). Today, it is considered a useful method for eliciting and aggregating expert opinion whenever there is a lack of viable or practical statistical techniques (Armstrong, 2001, 2006). It can be defined as a medium-term qualitative forecasting method that is based on building a consensus amongst a group of experts. In marketing, the Delphi method is mainly used to identify product attributes (Ray *et al.*, 2004; Huang and Lin, 2005) or to choose the criteria underlying consumer acceptability of an innovative product (Padel and Midmore, 2005; Verleye and de Marez, 2005). A Delphi type-study enables an exchange of information amongst anonymous experts (no expert knows which other experts are going to be consulted) over a number of rounds (iterations) and allows experts to react to the information gathered during each round and to fine-tune their forecast by means of a feedback mechanism (controlled retroaction). Beyond these three main principles (anonymity – iteration – retroaction), the method's validity is firstly based on a rigorous selection of experts whose combined knowledge and expertise must reflect the full scope of the problem area. Some have suggested asking the persons involved to estimate their own degree of expertise, with others considering that the level of expertise does not necessarily need to be high (Rowe and Wright, 2001). Delphi's validity is also dependent on the size of the group of experts (Vernette, 1997). It appears that the minimum threshold is 5–7 experts, and that a range of 8–10 offers the best precision/cost ratio. Beyond 12 experts, information contributions are marginal. Finally the method's validity relies on a strict implementation of process: three iterations are usually needed to obtain a satisfactory consensus.

In our first study phase, we drew up a list of the most suitable European experts. Our aim was to mix academics, consultants and even practitioners from many different European countries. We eschewed published papers towards this end, because we wanted to avoid any restrictions on our experts' diversity. Instead, we focused on the individual's

reputation and recognition in academic circles. To avoid any type of collusion or friendship side effects, we did not ask for experts' names but devised a questionnaire on RM and CRM (see Figure 1). We then sent this questionnaire to 15 highly renowned professors (one per European country or group of countries) known for their 'panoramic' views, wide marketing knowledge and 'neutral' approach to the topic in question (since these were not relationship marketing specialists). The basic selection criterion for these professors was their authorship of 'the'

key marketing textbook in their country of origin. Where a given country featured several major textbooks, we selected the professor who was the less involved in RM and/or to whom we had greater access.

The questionnaire allowed us to identify about thirty European experts. We built a quotation index for these experts based on the frequency of their names' appearance (as textbook or case study authors) in the responses we were given by the 'professors'. We

Figure 1 Selection of Experts

The Process

- Which textbook is the reference (European or North American) on relationship marketing that you or your colleagues use the most in your country?
- Which textbook is the reference (European or North American), on CRM that you or your colleagues use the most in your country?
- Which textbook is the local reference (written in the official language and by an expert of your country) on relationship marketing that you or your colleagues use the most in your country (if different from the previously stated reference)?
- Which textbook is the local reference (written in the official language and by an expert of your country) on CRM that you or your colleagues use the most in your country (if different from the previously stated reference)?
- Which relationship marketing business case (European or North American) you or your colleagues most frequently use in your country?
- Which local relationship marketing business case you or your colleagues most frequently use in your country?
- Which CRM business case (European or North American) you or your colleagues most frequently use in your country?
- Which local CRM business case you or your colleagues most frequently use in your country?
- What is the reference consulting group (European or North American) on relationship marketing in your country?

The Result*Belgium*

- Mr Philippe Payard, Senior Business Analyst in Peppers & Rogers Group

Finland

- Prof. Dr Kaj Storbacka, Founder and Fellow of Vectia Ltd, Professor of Sales and Account Management at Nyenrode Business School

France

- Prof. Dr Patrick Hetzel, Professor of Marketing at the University of Panthéon-Assas Paris II, Rector of the Academy of Limoges

Germany

- Dr Stephan A. Butscher, Partner at Simon Kücher & Partners

Hungary

- Prof. Dr Zoltan Veres (Hungary), Head of Institute at Szeged University, Scientific Vice-President of the Budapest Business School

Italy

- Prof. Dr Michele Costabile, Professor of Marketing at the University of Calabria and at the SDA Bocconi Milan

Spain

- Dr Josep Alet, President of MarketingCom, President of the AGEMDI (Spanish Association of Direct Marketing and Interactive Agencies)
- Dr Enrique Benayas, Managing Director of ICEMD and Vice-Chairman of FECEMED's education committee

Sweden

- Prof. Dr Evert Gummesson (Sweden), Professor of Service Management and Marketing at the Stockholm University School of Business

Switzerland

- Prof. Dr Manfred Bruhn (Switzerland), Chair of Marketing University of Basel

United Kingdom

- Prof. Dr David Ford (U.K.), Professor of Business Marketing at the University of Bath, Co-Founder of the IMP Group
 - Prof. Dr Andrew Payne (U.K.), Professor of Services and Relationship Marketing, Director of the Center of Customer Relationship Management at the Cranfield School of Management
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tried to select one per country (the expert with the best quotation score) to ensure a diversity of opinions, and then limited our choice to fifteen countries to avoid ending up with too large a group of experts. Finally, twelve of them agreed to take part in our

Delphi study. They originated from Belgium (1), Finland (1), France (1), Germany (1), Hungary (1), Italy (1), Spain (2, including the director of a major European institute), Sweden (1), Switzerland (1) and the UK (2, including one of the major BtoB experts).

Figure 2 Selection of Quotes

The Process

- We collected all the papers of the special issues of the *Journal of Business and Industrial Marketing* (Vol. 19, No. 2, 2004) and *Marketing Theory* (Vol. 3, No. 1, 2003) plus the first issue of the new *Journal of Relationship Marketing* (Vol. 1, No. 1, 2002);
- Then, we identified all the sentences which related to major issues currently being discussed in the sub-discipline of relationship marketing;
- We listed more than 40 sentences;
- We re-classed by topic the sentences which were dealing with closely related issues;
- We ended with 8 topics in which we selected 8 quotes from European leading figures in the sub-discipline;
- We compared these quotes with current statements on relationship marketing from fields closely related to the sub-discipline (experiential marketing and communal/tribal marketing) and we decided to add a further two quotes which we felt were necessary;
- We ended with the 10 quotes as listed hereunder.

The Result

- **Quote 1:** "People used to predict that, by the end of the twentieth century, RM abetted by IT would 'rule the world', but instead mass marketing seems to prevail, often driven by CRM software. The drive toward a form of marketing that will exist comfortably in all situations means settling for the lowest common denominator. The holy grail of 'one-size-fits-all' seems to be the aim. This directly contradicts the approach that acknowledges RM has limitations and must co-exist with more traditional forms of marketing", (Egan, 2003, p. 153).
- **Quote 2:** "The divide seems principally to be between those who see RM as a wide range of relationships, albeit that its benefits appear limited to certain industries and situations, and those whose definition is restricted to customer/firm relationship (CRM) but who choose to apply relational thinking across the industrial board. In effect, the divide is between a broad definition of RM with a narrow application and a narrower viewpoint with a distinctly broader application", (Egan, 2003, p. 151).
- **Quote 3:** "Although information technology has the potential to add to a company's relationship advantage, this is dependent upon two principal factors: whether the company needs large volumes of information about its customers; and whether a relationship based program will provide information that the company did not previously have" (Palmer, 2002, p. 86).
- **Quote 4:** "Managers who consider a RM and CRM strategy must ask the question: Does RM and CRM pay? We can broaden the question: Is it possible to gauge return on investment? Return on relationships (ROR) is the long-term net financial outcome caused by the establishment and maintenance of an organization's network of relationships" (Gummesson, 2004, p. 141).
- **Quote 5:** "The marketer must know the value systems that guide the customer. These could be, for example, an interest in preserving the rain forest or in minimizing stocks. If the marketer does not understand these aspects of the customer's value systems and value-generating process, products and services, information and other elements of the interaction process cannot be developed satisfactorily and value for the customer cannot be create successfully" (Grönroos, 2004, p. 155).
- **Quote 6:** "It has been noted that consumers increasingly recognize that personal data has a value and are typically becoming more instrumental in the manner in which personal information is divulged. This represents a new challenge for relationship marketing in consumer markets, and may require a change in the attitude of some consumer marketers that relationship marketing is something that companies "do" to customers" (Palmer, 2002, p. 85).
- **Quote 7:** "We need to know more about how to summon the different stakeholders and the firm in an interaction mode that is characterized by genuine dialogue. This raises a number of issues about the mode of communication links to be employed, forums for discussion and incentives to be provided for doing so" (Tzokas and Saren, 2004, p. 132).
- **Quote 8:** "To build a relationship with its customers, the organization has to know them overall: more information means more customer knowledge and so, new opportunities in terms of personalization of the relationship. However, in a changing environment, it is the quality of interpretation of data that gives a firm a competitive advantage in its use of information" (Palmer, 2002, p. 85).
- **Quote 9:** "Customer Experience Management ("CEM") focuses on the experiences of customers and how those experiences influence behaviour. CRM solutions automate things like marketing and sales activities to increase efficiency and accuracy, but do little to improve the customer experience" (adapted from Schmitt, 2003).
- **Quote 10:** "Whereas RM aims at creating and developing a relation between the brand or the firm (even a member of the firm) and a customer, the brand community approach to marketing prefers to recreate and support the relation between customers. The communal inter-relations exert pressure on members to remain loyal to the collective and consequently to the brand" (adapted from Cova and Cova, 2002).

Each of the selected twelve experts was then shown the same ten quotes chosen following a bibliographic analysis carried out on the aforementioned academic journals' special issues on relationship marketing. To achieve the most open representation of RM's future, we decided not to ask specific questions about specific topics but instead to ask experts for their reactions to quotes from other experts, thereby avoiding any re-translation bias we might have introduced. This is relatively unusual in Delphi approaches designed to produce quantitative 'forecasts' but it is relatively widespread in qualitative applications of the Delphi approach for predicting future fashions and trends (Morace, 2003). We restricted ourselves to 10 quotes. These 10 quotes' selection then went through a very specific sequence (see Figure 2).

After initial testing, the predictive discussion on our 10 quotes was followed by 90-minute interviews (regarded as a maximum duration by experts). Our role in these interviews was to get the interviewee to react to each of the identified topics by intermittently encouraging him/her to clarify specific points. We did not direct the conversation or intervene in a way that would alter or shift the emphasis of what was being said. Our only intervention was to remind the experts of the need to look to the long-term future (2015) and not simply react to the current context.

After an initial face-to-face meeting, each expert was provided with a summary of all responses. A second iteration, again on a face-to-face basis, was then needed to maintain or modify his/her initial position. The process was reiterated a third time, this time by e-mail. Instead of analysing the corpus of interviews statistically we did this thematically. After the first round of 12 experts' interviews, we conducted an inter-textual analysis (Krippendorf, 1980) of the 12 interviews on a quote-per-quote basis. Since four of us were involved in carrying out this analysis, we split up into two 2-person teams and divided up the interviews so that each was analysed by at least two different people to reduce the influence of subjective bias. This thematic analysis (occurrence of themes and frequency of experts developing a theme) translated into more than thirty themes (2 or 3 per quote on average). We then assessed the frequency of convergent and divergent expert viewpoints towards each theme (Ogden *et al.*, 2005) and then attributed a number between 1 and 12 to each expert's view towards each theme. This became the basis for the second round of expert interviews. We would remind each expert of his/her original number and therefore position, before letting him/her confirm or alter this position on each topic, after taking other experts' viewpoints into account. Whenever respondents changed position on a specific theme, we would ask them for a short comment/explanation, before repeating our assessment of convergent and divergent expert viewpoints for each

theme. The third round led to a validation of the list of themes, and of experts' positions on each theme (Ogden *et al.*, 2005).

European Representations of Relationship Marketing in the Year 2015

After the three Delphi rounds, our interpretation of the results identified four major themes that can be summarized as follows:

1. A RM philosophy will continue to develop but it will not replace mass marketing. Its perspective will extend from a simple customer relationship to a collection of relationships with the network of players connected to a business;
2. The implementation of RM approaches like CRM will be supported by more sophisticated IT and more 'intelligent' database management. The profitability of these applications will become increasingly measured and measurable;
3. Consumers will increasingly resist firms' attempts to 'create' a relationship and become increasingly powerful parties in relationships that they will want to shape. Businesses will learn to incorporate this shift in the relationship's balance of power by involving consumers in the value creation process;
4. A consumer's experience, alone and as part of a community, will become a key aspect of relationship approaches. It will be necessary to collect relevant data by using approaches taken from social sciences. Businesses will have to work on this highly emotional aspect without being intrusive and without wanting to over-manage or exert too much control.

If we compare the Delphi survey findings with the most recent contributions in the field (Boulding *et al.*, 2005; Payne and Frow, 2005) and with the most recent papers dealing with relationship marketing's future orientations (Harker and Egan, 2006; Palmer *et al.*, 2005), we find evident similarities. Whether or not relationship marketing constitutes a veritable leap forward for marketing, there is no current consensus about the theoretical foundations and particularities of its practices as opposed to the ones found in so-called transactional marketing (Palmer *et al.*, 2005). The balance of power between the tenants of a broad vision of relationship marketing as introduced by Morgan and Hunt (1994) and those who would like to refocus the concept on the company-customer tandem remains unresolved, with the latter school being of the opinion that integrating other stakeholders is tantamount to diluting marketing's essence and limiting its impact in terms of the practices used (Harker and Egan, 2006). However, this will lead to a clearer differentiation being made between RM construed as a philosophy or a

framework for thinking about relationship-oriented companies, and CRM understood as a systematic process to manage customer relationship initiation, maintenance, and termination across all customer contact points with a view towards maximising the value of a relationship portfolio (Reinartz *et al.*, 2004). Collaboration amongst marketing operatives, market analysts, IT experts, database managers and customer contact staff will guarantee the quality of the data management. This cross-functional integration of processes, people, operations, and marketing capabilities will be enabled through information, technology and applications (Payne and Frow, 2005). The question of profitability will lead to more appropriate methods involving a measurement of its ROI (Reinartz and Kumar, 2000, 2003; Reinartz *et al.*, 2004; Rust *et al.*, 2004).

Consumers' rising resistance and its corollary (customer empowerment strategies that force companies to develop more participatory approaches) comprise a theme that may also appear coherent with some recent (C)RM research results (Lewis, 2005). The idea here is that tomorrow's marketing winners will be firms capable of co-creating value with their consumers (Prahalad and Ramaswamy, 2004). Delphi survey findings go further, however, and forecast that customers could either decide to deliver certain types of personal profile-related information to given firms only, or else to favour socially responsible companies like Max Havelaar or another structure offering relational modes based on social rather than commercial precepts.

Lastly, there is a theme that Delphi study experts consider crucial to RM's future yet which is not being fully tackled in today's (C)RM literature. This may well be the present study's main contribution, to wit, the need to devise anthropological kinds of data that account more fully for consumers' real experiences at an individual or collective level, the purpose being to organise product offers that can be more easily embedded in consumers' value systems. This original contribution will be discussed through three key points grounded in experts' statements and related literature.

Placing the Experience at the Heart of the Relational Approach

In the experts' view, (C)RM approaches all have at their core a desire to improve the customers' experience. RM's growth will be mainly driven by the touch point experiences that customer will be sharing with companies: *"It's the new trend; you have to understand your customers' expectations that value stems from increased interaction with them. The next decade will focus on emotional benefits"*. Consumption experiences are currently being theorised as personal and subjec-

tive episodes that people go through, incidences that are often laden with emotionality for consumers (Holbrook and Hirschman, 1982). From a managerial perspective, a customer experience can be defined as the blend between a company's physical performance and the emotions it evokes.

The main point is that consumption experiences must be memorable and speak to the individual's personal sphere (Pine and Gilmore, 1999). CEM, Customer Experience Management (Schmitt, 2003) is the process of strategically managing a customer's entire experience with a product or a company. This process has five basic steps: analyse the customer's experiential world; build an experiential platform; design a brand experience; structure a customer interface; and innovate continuously. As one expert states, *"CRM will evolve into customer experience management one day. The best way to create customer value is to ensure an excellent experience whenever the customer meets the company (ensure his/her recognition, etc.)"*. Whenever customers come into contact with a company they experience what it is like to deal with that organization and they form an opinion. The experience is the ultimate conveyor of value to the customer and a primary influence on future behaviour – hence its great potential value to the enterprise. As one expert said, *"Businesses face two challenges in making CEM a reality. The first is to understand which aspects of the current customer experience are impacting—positively or negatively—customer satisfaction, retention, revenue, and service costs. The second challenge is to drive organisational change by executing intelligent actions within your existing processes and systems"*.

For most experts, it is quite clear that a new approach is necessary, and not only for data management reasons. (C)RM will become an enabler of customer experiences: *"It is about capturing data, analysing data and putting that knowledge into practice with better products and better services, thereby producing a better consumer experience"*. At the same time, *"the most important thing is to develop partnerships within the company, to coordinate processes and deliver consistency"*. According to experts, this will require training and employee empowerment: *"Employees at sales points and on the telephone need training. They require information but also enough freedom to ask questions and take ownership of the relationship. They don't just perform tasks but answer customers' questions and solve their problems. They share emotions and improve the customer's experience"*.

That said, experts criticise the limited and planned nature of these consumption experiences, which are too coherent and pre-determined and have therefore met with resistance from a number of consumers (Carù and Cova, 2006). Indeed, such experiences leave consumers very little room to really participate in their conception and construction. For many consumers, a consumption experience is more than the simple acceptance of a pre-packaged offer. *"The*

customer's experience has to be combined with what the firm is experiencing at the same time, but it can't be phoney otherwise it won't last. We have to get just the right dose where either the consumer chooses to share his/her experience freely or where the firm slowly gets the consumer to share the experience and then re-uses it to improve or create new products or services''.

Searching for a New Generation of Data

Experts speak of a major change in the kinds of data that should be used in RM approaches. Transactional data is likely to be complemented by experiential, emotional and/or symbolic data arising from the customer's experience and calling on methods rooted in anthropology, ethnology and sociology. According to one of the experts, *"To know and to understand how to create value for the customer, you have to really understand customer processes and try to map them. On the one hand, all customers engage in consumption processes: for example, I have a process with my family, when I am driving my car, with my groceries, etc. On the other hand, all customers have values and attitudes that determine what is important for them, and the purpose is to combine these two elements. There are interesting developments in anthropological studies that observe customers in different types of environments. For example, I know that Nokia observes how people use their new phones, rather than asking people explicitly whether they like it''?* This is in tune with what Fournier *et al.* (1998, p. 47) argued years ago when they wrote that, when seeking the archetypical middle-American mom, *"A manager should rent a van, drive her team to DeSoto, Missouri, and 'live with the natives'. She should go to church with them, hang out at the local VFW, attend the parent-teacher conference on Thursday night''.*

In actual fact, the experts recognize the inherent limitations of the verbal reports that customers give when describing their responses to increasingly intangible product offers like experiences, or else when defining what they see as the real sources of value. As one of the experts declares, *"Customers probably don't know themselves. So when I say 'value system', I am talking about an implicit value system''.* At the same time, another expert forecast that. *"Data will have to concern the individual consumer but in informative fields we need to build a context for the product's social use. This is a new field of information and it is neither incompatible nor is it an alternative. Social context and social influences are important for information on consumers' experiential orientations''.* Experts globally predict a general trend towards the increased use of social scientists to understand consumers' value systems.

Some define this range of methods as market-oriented ethnography or ethno-marketing (Arnould and Waddock, 1994). The beauty of ethnography, say its proponents, is that it provides a richer understanding of consumers than traditional research does. Ethnog-

raphy, with its focus on observed everyday behavior, is quickly becoming the method of choice to identify unmet needs, stimulate novel insights, create strategies and develop new ideas (Mariampolski, 2001). Consumer ethnography aims to pin down intangible elements that are imperceptible when apprehended singly but become discernible when an experience takes place in the atmosphere of trust that marketers and consumers can develop when they work together for a certain period of time. As a counterpoint, one expert states that, *"Database management is important but doesn't enable tacit customer knowledge to be collected (behaviors, attitudes, captured whenever customers are in contact with the company). This is why it's very important to create a true dialogue with the front line people who are in contact with the customers''.*

The use of ethnography and other participative data gathering approaches (Elliott and Shankar, 2005) like Netnography (ethnography on the Net – Kozinets, 2002) will become all the more appropriate as companies no longer sell products alone but experiences as well (Vargo and Lusch, 2004). Indeed, the ethnological approach will be particularly relevant when it comes to managing touch points between a company and its customer. As one expert says, *"Vendors, who themselves are close to customers, complain that some marketers are too distant, that they no longer know their clients or see them as people''.* One possible outcome is the empowerment of the vendors, helping them to become ethnographers or ethno-marketers and thereby contribute to the gathering of this new generation of data.

Playing the Community Game

The experts believe that brand communities will become one of the main tools in the RM 'toolbox' and a major factor in creating customer loyalty. A brand community or brand tribe (Muniz and O'Guinn, 2001) has been defined as any group of people that possess a common interest in a specific brand and create a parallel social universe (subculture) rife with its own myths, values, rituals, vocabulary and hierarchy (Muniz and Schau, 2005). The experts think that relational marketing would increasingly incorporate these co-constructed movements that can be initiated by the firm or independently of the firm. Thus, according to one expert, *"We are moving towards one-to-cluster loyalty: the community and its intelligent management (and not manipulation) will become a sincere and authentic interaction tool and create network loyalty mechanisms''.* According to another expert, however, *"This does not suit all industries since you already need the right products or services. I don't think that the concept of brand communities is relevant to electricity companies for example. But if you sell Harley Davidson motorcycles, the emotional side is there; for Apple computers too. The concept of brand community cannot be applied to something lacking in emotion''.*

Recent research has highlighted the many problems a company can have when interacting with this type of hard-to-control collective actor whom the Net has spontaneously spawned and fostered (Broderick *et al.*, 2003). Brand communities are stakeholders in a position of power and according to the experts they will have to be treated in the same way as other stakeholders are, by avoiding any overly intrusive form of control over these communities and by working together with them. As one expert says, "In the future, relationship marketing will be able to create and maybe actively use communities or else just follow in their tracks. Companies might provide a platform and put on some events but at the end of the day companies won't be too pushy. In fact, customer interaction will become the core of the marketing process". In other words, companies no longer force their communications onto customers – customers are the ones wielding power (Newell, 2003). The shared passion of certain consumers for a cult brand translates, via various collective learning systems, into expertise and competency, thereby imbuing brand tribes with increasing amounts of communications and marketing legitimacy (O'Guinn and Muniz, 2005).

The major point here is that a new ethos of brand participation is emerging. Consumers increasingly see brands as shared cultural property rather than as privately owned intellectual property. Familiarity breeds proprietorial sentiments: brands 'belong to us' and not to the companies that supposedly own them. This means that the obvious question for the future is "who will own the brand" (O'Guinn and Muniz, 2005)? Brand communities assert considerable claims on ownership. These impassioned and empowered consumer collectives wield more channel power and make claims on core competencies that used to belong to the marketer alone. One expert believes that, "The future of relational marketing will depend on the ability to play with communities that can either destroy a firm or strengthen it. Between now and 2015, identifying a consumer's experiences, or those of a group of consumers will create a marketing that is truly relational. This will be a wonderful challenge for any firm that understands the complexity of a relationship which will be increasingly facilitated by current and future modes of communication". Some experts propose developing the notion of a "partnership" between a company and a community, meaning that specific resources will be committed to manage (as opposed to controlling) these communities. One possible outcome will be to invest fewer resources in managing the direct relationship between customer and company, and to develop resources capable of managing inter-customer relationships.

Conclusion

These Delphi survey findings result from the joint input of 12 experts interacting with four researchers.

As such, the validity of this construction is dependent on the personal context in which these persons are embedded. The four European researchers made a policy choice to select only European experts so as to counterbalance a North-American dominant vision of (C)RM with a Pan-European representation thereof. This offers the benefit of an alternative view but also runs the risk of a limited vision. Yet a detailed overview of the sum total of the present findings reveals the advantages of, and need for, this kind of forecasting. It is important that researchers and practitioners supplement descriptive or explanatory approaches with prospective (as opposed to predictive) ones that can help to elucidate the future and illuminate researchers' choices as well as corporate decisions.

There is a need to reassure firms whose new approaches are predicated on investment choices. A prospective representation can inject meaning into their decisions and help them to produce a future that fits in harmoniously with whatever decisions they have taken. Thus, the many companies that have started to develop RM approaches that (as some experts envisage) strongly integrate consumption's experiential and communal dimensions are helping to build up a RM that also meshes with the decisions they have taken. In other words, the four themes we came up with do not constitute RM's future but instead provide a whole set of inter-subjective representations that researchers and managers can rely upon to build the RM of the future. It remains that one specific theme offers a clear way of enhancing the RM approach via greater employee participation (ethnography) and customer emotional bonding (community). Further research along these lines could be dedicated to investigating the extent to which companies can be expected to decrease their "management" of consumers and stakeholders to increasingly "meet them halfway" thanks to their empowered employees.

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