

ARVID O. I. HOFFMANN

Curriculum Vitae – April 2024

Professor of Marketing | University of Adelaide Business School

10 Pulteney Street | SA 5005 Adelaide | Australia | ✉ arvid.hoffmann@adelaide.edu.au

EDUCATION

2007: Ph.D. in Economics and Business, University of Groningen, the Netherlands.

2003: M.Sc. in Business Administration, University of Groningen, the Netherlands.

EMPLOYMENT

2017 – now: Professor, University of Adelaide Business School, Australia.

2015 – 2016: Associate Professor, Maastricht University, the Netherlands.

2007 – 2015: Assistant Professor, Maastricht University, the Netherlands.

OTHER AFFILIATIONS

2018 – now: ARC Centre of Excellence in Population Ageing Research (CEPAR).

2008 – 2018: Network for Studies on Pensions, Aging and Retirement (Netspar).

RESEARCH INTERESTS

Substantive: marketing-finance interface; marketing strategy; consumer financial decision-making and well-being.

Methodological: econometric modeling; text analysis; secondary data; trading records; household surveys; experiments.

KEY PUBLICATIONS AND INVITED REVISIONS

- Schomburgk, L., A. Belli & **A. O. I. Hoffmann** (2024). “Topic: Cashless Payment Methods.”
Journal of Retailing (Under 2nd Round Review)
- **Hoffmann, A. O. I.**, C. S. Cheong, H.-L. Phan & R. Zurbruegg (forthcoming). “So, Sue Me ... If You Can! How Legal Changes Diminishing Managers’ Risk of Being Held Liable by Shareholders Affect Firms’ Likelihood to Recall Products.” Accepted for publication in the *Journal of Marketing*.
- Cheong, C. S., **A. O. I. Hoffmann** & R. Zurbruegg (2021). “Tarred with the Same Brush? Advertising Share of Voice and Stock Price Synchronicity.” *Journal of Marketing*, 85 (6), 118-140.
- Wies, S., **A. O. I. Hoffmann**, J. Aspara & J. M. E. Pennings (2019). “Can Advertising Investments Counter the Detrimental Effect of Shareholder Complaints on Firm Value?” *Journal of Marketing*, 83 (4), 58-80.
- **Hoffmann, A. O. I.** & T. L. J. Broekhuizen (2010). “Understanding Investors’ Decisions to Purchase Innovative Products: Drivers of Adoption Timing and Range.” *International Journal of Research in Marketing*, 27 (4), 342-355.
- **Hoffmann, A. O. I.** & T. L. J. Broekhuizen (2009). “Susceptibility to and Impact of Interpersonal Influence in an Investment Context.” *Journal of the Academy of Marketing Science*, 37 (4), 488-503.

RESEARCH IMPACT

Google Scholar citations: 3,300 (h-index = 27; i10-index = 43).

Selected media coverage: *ABC News, BBC Capital, Bloomberg, CNBC, Financial Times, Forbes, Handelsblatt, New York Times, Neue Zürcher Zeitung, Reuters, derStandard.at, The Globe and Mail, Het Financieele Dagblad.*

COMPLETE LIST OF PUBLICATIONS

Journal Articles:

1. **Hoffmann, A. O. I.**, C. S. Cheong, H.-L. Phan & R. Zurbruegg (forthcoming). “So, Sue Me ... If You Can! How Legal Changes Diminishing Managers’ Risk of Being Held Liable by Shareholders Affect Firms’ Likelihood to Recall Products.” Accepted for publication in the *Journal of Marketing*.
2. D’Hondt, C., P. Roger, D. Plotkina & **A. O. I. Hoffmann** (forthcoming). “Is There a Gender Gap in the Birthday-Number Effect? The Case of Lotto Players and the Role of Sequential Choice.” Accepted for publication in the *Journal of Gambling Studies*.
3. Dodd, T., C. S. Cheong, **A. O. I. Hoffmann** & R. Zurbruegg (forthcoming). “Toward Sustainable Automobility: Insights from a Stewardship Literature Review of the Industry.” Accepted for publication in *Business Strategy and the Environment*.
4. Silber, D., **A. O. I. Hoffmann** & A. Belli (2024). “When “Good Enough” is not Good Enough: How Maximizing Benefits Financial Well-Being.” *Psychology and Marketing*, 41 (2), 308-327.
5. Kleimeier, S. K., **A. O. I. Hoffmann**, M.-H. Broihanne, D. Plotkina & A. S. Göritz (2023). “Determinants of Individuals’ Objective and Subjective Financial Fragility during the COVID-19 Pandemic.” *Journal of Banking and Finance*, 153 (August), 106881.
6. Saleem, A., F. Barbera, S. B. de Jong & **A. O. I. Hoffmann** (forthcoming). “The Role of Emotional Labor and Display Latitude in Preserving Socioemotional Wealth in Family Businesses.” Accepted for publication in the *Journal of Family Business Strategy*.
7. Hentzen, J. K., **A. O. I. Hoffmann** & R. M. Dolan (forthcoming). “The Role of Digital Technology in Communication and Information Flow in the Australian Superannuation Industry.” Accepted for publication in the *Australian Journal of Management*.
8. Goyal, K., S. Kumar & **A. O. I. Hoffmann** (2023). “The Direct and Indirect Effects of Financial Socialization and Psychological Characteristics on Young Professionals’ Personal Financial Management Behavior.” *International Journal of Bank Marketing*, 41 (7), 1550-1584.
9. Schomburgk, L. & **A. O. I. Hoffmann** (2023). “How Mindfulness Reduces BNPL Usage and How That Relates to Overall Well-Being.” *European Journal of Marketing*, 57 (2), 325-359.
10. Roger, P., C. D’Hondt, D. Plotkina & **A. O. I. Hoffmann** (2023). “Number 19: Another Victim of the COVID-19 Pandemic?” *Journal of Gambling Studies*, 39, 1417-1450.
11. Hentzen, J. K., **A. O. I. Hoffmann**, R. M. Dolan & E. Pala (2022). “Artificial Intelligence in Customer-Facing Financial Services: A Systematic Literature Review and Agenda for Future Research.” *International Journal of Bank Marketing*, 40 (6), 1299-1336.
12. **Hoffmann, A. O. I.**, D. Plotkina, C. D’Hondt & P. Roger (2022). “Superstitious Beliefs, Locus of Control, and Feeling at Risk in the Face of Covid-19.” *Personality and Individual Differences*, 196 (October), 111718.

13. Chan, R., I. Troshani, S. Rao Hill & **A. O. I. Hoffmann** (2022). “Towards an Understanding of Consumers’ FinTech Adoption: The Case of Open Banking.” *International Journal of Bank Marketing*, 40 (4), 886-917.
14. Hentzen, J. K., **A. O. I. Hoffmann** & R. M. Dolan (2022). “Which Consumers are More Likely to Adopt a Retirement App and How Does it Explain Mobile Technology-Enabled Retirement Engagement?” *International Journal of Consumer Studies* 46 (2), 368-390.
15. **Hoffmann, A. O. I.**, D. Plotkina, M.-H. Broihanne, A. Göritz, and S. Kleimeier. (2022). “Differences in and Drivers of Mental, Social, Functional, and Financial Well-Being During COVID-19: Evidence from Australia, France, Germany, and South Africa.” *PLOS ONE*, 17 (10), e0276077.
16. Cheong, C. S., **A. O. I. Hoffmann** & R. Zurbrugg (2021). “Tarred with the Same Brush? Advertising Share of Voice and Stock Price Synchronicity.” *Journal of Marketing*, 85 (6), 118-140.
17. **Hoffmann, A. O. I.** & D. Plotkina (2021). “Positive Framing When Assessing the Personal Resources to Manage One’s Finances Increases Consumers’ Retirement Self-Efficacy and Improves Retirement Goal Clarity.” *Psychology and Marketing*, 38 (12), 2286-2304.
18. **Hoffmann, A. O. I.** & D. Plotkina (2021). “Let Your Past Define Your Future? How Recalling Successful Financial Experiences Can Increase Beliefs of Self-Efficacy in Financial Planning.” *Journal of Consumer Affairs*, 55 (3), 847-871.
19. Tomar, S., H. K. Baker, S. Kumar, & **A. O. I. Hoffmann** (2021). “Psychological Determinants of Retirement Financial Planning Behavior.” *Journal of Business Research*, 133 (September), 432-449.
20. **Hoffmann, A. O. I.** & S. Kleimeier (2021). “Financial Disclosure Readability and Innovative Firms’ Cost of Debt.” *International Review of Finance*, 21 (2), 699-713.
21. **Hoffmann, A. O. I.**, S. J. McNair & J. I. Pallant (2021). “The Financial Vulnerability Trap: Using Latent Transition Analysis to Explore the Dynamics of Consumers’ Financial Vulnerability over Time.” *European Journal of Marketing*, 55 (6), 1569-1593.
22. **Hoffmann, A. O. I.** & S. Kleimeier (2021). “How do Banks Finance R&D Intensive Firms? The Role of Patents in Overcoming Information Asymmetry.” *Finance Research Letters*, 38 (January), 101485.
23. **Hoffmann, A. O. I.** & L. Risse (2020). “Do Good Things Come in Pairs? How Personality Traits Help Explain Individuals’ Simultaneous Pursuit of a Healthy Lifestyle and Financially Responsible Behavior.” *Journal of Consumer Affairs*, 54 (3), 1082-1120.
24. **Hoffmann, A. O. I.** & D. Plotkina (2020). “Why and When Does Financial Information Affect Retirement Planning Intentions and Which Consumers are More Likely to Act on Them?” *Journal of Business Research*, 117 (September), 411-431.
25. Wies, S., **A. O. I. Hoffmann**, J. Aspara & J. M. E. Pennings (2019). “Can Advertising Investments Counter the Detrimental Effect of Shareholder Complaints on Firm Value?” *Journal of Marketing*, 83 (4), 58-80.
26. **Hoffmann, A. O. I.**, S. Kleimeier, N. Mimioglu & J. M. E. Pennings (2019). “The American Inventors Protection Act: A Natural Experiment on Innovation Disclosure and the Cost of Debt.” *International Review of Finance*, 19 (3), 641-651.
27. **Hoffmann, A. O. I.** & S. J. McNair (2019). “How does Consumers’ Financial Vulnerability Relate to Positive and Negative Financial Outcomes? The Mediating Role of Individual Psychological Characteristics.” *Journal of Consumer Affairs*, 53 (4), 1630-1673.

28. Gerhard, P., Gladstone, J. J. & **A. O. I. Hoffmann** (2018). “Psychological Characteristics and Household Savings Behavior: The Importance of Accounting for Latent Heterogeneity.” *Journal of Economic Behavior and Organization*, 148 (April), 66-82.
29. **Hoffmann, A. O. I.** & K. Otteby (2018). “Personal Finance Blogs: Helpful Tool for Consumers with Low Financial Literacy or Preaching to the Choir?” *International Journal of Consumer Studies*, 42 (2), 241-254.
30. **Hoffmann, A. O. I.** & T. Post (2017). “How Return and Risk Experiences Shape Investor Beliefs and Preferences.” *Accounting and Finance*, 57 (3), 759-788.
31. Gerhard, P., **A. O. I. Hoffmann** & T. Post (2017). “Past Performance Framing and Investors' Belief Updating: Is Seeing Long-Term Returns Always Associated with Smaller Belief Updates?” *Journal of Behavioral and Experimental Finance*, 15 (September), 38-51.
32. **Hoffmann, A. O. I.** & T. Post (2016). “How Does Investor Confidence Lead to Trading? Linking Investor Return Experiences, Confidence, and Investment Beliefs.” *Journal of Behavioral and Experimental Finance*, 12 (December), 64-78.
33. Aspara, J., A. Chakravarti & **A. O. I. Hoffmann** (2015). “Focal versus Background Goals in Consumer Financial Decision-Making: Trading Off Financial Returns for Self-Expression?” *European Journal of Marketing*, 49 (7/8), 1114-1138.
34. **Hoffmann, A. O. I.** & D. Ketteler (2015). “How Experiences with Trading a Company’s Stock Influence Customer Attitudes and Purchasing Behavior.” *International Journal of Bank Marketing*, 33 (7), 963-992.
35. **Hoffmann, A. O. I.**, T. Post & J. M. E. Pennings (2015). “How Investor Perceptions Drive Actual Trading and Risk-Taking Behavior.” *Journal of Behavioral Finance*, 16 (1), 94-103.
36. Aspara, J. & **A. O. I. Hoffmann** (2015). “Cut Your Losses and Let Your Profits Run: How Shifting Feelings of Personal Responsibility Reverses the Disposition Effect.” *Journal of Behavioral and Experimental Finance*, 8 (December), 18-24.
37. Aspara, J. & **A. O. I. Hoffmann** (2015). “Selling Losers and Keeping Winners: How (Savings) Goal Dynamics Predict a Reversal of the Disposition Effect.” *Marketing Letters*, 26 (2), 201-211.
38. **Hoffmann, A. O. I.** & T. Post (2014). “Self-Attribution Bias in Consumer Financial Decision-Making: How Investment Returns Affect Individuals’ Belief in Skill.” *Journal of Behavioral and Experimental Economics*, 52 (October), 23-28.
39. **Hoffmann, A. O. I.** & H. Shefrin (2014). “Technical Analysis and Individual Investors.” *Journal of Economic Behavior and Organization*, 107 (November), 487-511.
40. **Hoffmann, A. O. I.**, S. F. Henry & N. Kalogeras (2013). “Aspirations as Reference Points: An Experimental Investigation of Risk Behavior over Time.” *Theory and Decision*, 75 (2), 193-210.
41. Merrin, R. P., **A. O. I. Hoffmann** & J. M. E. Pennings (2013). “Customer Satisfaction as a Buffer Against Sentimental Stock-Price Corrections.” *Marketing Letters*, 24 (1), 13-27.
42. **Hoffmann, A. O. I.**, T. Post & J. M. E. Pennings (2013). “Individual Investor Perceptions and Behavior During the Financial Crisis.” *Journal of Banking and Finance*, 37 (1), 60-74.
43. **Hoffmann, A. O. I.** & C. Birnbrich (2012). “The Impact of Fraud Prevention on Bank-Customer Relationships: An Empirical Investigation in Retail Banking.” *International Journal of Bank Marketing*, 30 (5), 390-407.
44. **Hoffmann, A. O. I.** & T. Fischer (2012). “Behavioral Aspects of Covered Call Writing: An Empirical Investigation.” *Journal of Behavioral Finance*, 13 (1), 66-79.

45. **Hoffmann, A. O. I.**, H. Franken & T. L. J. Broekhuizen (2012). "Customer Intention to Adopt a Fee-Based Advisory Model: An Empirical Study in Retail Banking." *International Journal of Bank Marketing*, 30 (2), 102-127.
46. Broekhuizen, T. L. J. & **A. O. I. Hoffmann** (2012). "Interactivity Perceptions and Online Newspaper Preference." *Journal of Interactive Advertising*, 12 (2), 29-43.
47. **Hoffmann, A. O. I.**, J. M. E. Pennings & S. Wies. (2011). "Relationship Marketing's Role in Managing the Firm-Investor Dyad." *Journal of Business Research*, 64 (8), 896-903.
48. **Hoffmann, A. O. I.**, A. Tutic & S. Wies (2011). "The Role of Educational Diversity in Investor Relations." *Corporate Communications: An International Journal*, 16 (4), 311-327.
49. **Hoffmann, A. O. I.** & T. L. J. Broekhuizen (2010). "Understanding Investors' Decisions to Purchase Innovative Products: Drivers of Adoption Timing and Range." *International Journal of Research in Marketing*, 27 (4), 342-355.
50. **Hoffmann, A. O. I.** & T. L. J. Broekhuizen (2009). "Susceptibility to and Impact of Interpersonal Influence in an Investment Context." *Journal of the Academy of Marketing Science*, 37 (4), 488-503.
51. **Hoffmann, A. O. I.**, W. Jager & J. H. von Eije (2007). "Social Simulation of Stock Markets: Taking it to the Next Level." *Journal of Artificial Societies and Social Simulation*, 10 (2), 7.

Book Chapters:

52. Kalogeras, N., **Hoffmann, A. O. I.** & D. Mahr (2014). "Financial and Non-Financial Attributes of Pension Fund Structures: A Customer Perspective from the Netherlands." In: T. Harrison & H. Estelami (Eds.), *The Routledge Companion to Financial Services Marketing*. New York: Routledge, 101-115.
53. **Hoffmann, A. O. I.**, S. A. Delre, J. H. von Eije & W. Jager (2006). "Artificial Multi-Agent Stock Markets: Simple Strategies, Complex Outcomes." In: C. Bruun (Ed.), *Advances in Artificial Economics: The Economy as a Complex Dynamic System*. Heidelberg: Springer Verlag, 167-176.
54. **Hoffmann, A. O. I.**, S. A. Delre, J. H. von Eije & W. Jager (2005). "Stock Price Dynamics in Artificial Multi-Agent Stock Markets." In: P. Mathieu, B. Beaufils, & O. Brandouy (Eds.), *Artificial Economics: Agent-Based Methods in Finance, Game Theory and Their Applications*. Heidelberg: Springer Verlag, 191-201.

Policy Articles:

55. **Hoffmann, A. O. I.** (2022). "Common Behavioural Biases that Impact Investment Returns." *Investors Voice: Magazine of the Australian Investors Association*, published online at investors.asn.au on March 14, 2022.
56. **Hoffmann, A. O. I.** (2016). "Beleggingspsychologie: Hoe een Duidelijk Beleggingsdoel het Dispositie Effect kan Omdraaien." *VBA Journaal*, 32 (Spring), 44-45. (in Dutch)
57. **Hoffmann, A. O. I.** & T. Post (2014). "Die Selbstüberschätzer: Weshalb Privatanleger selten aus ihren Fehlern lernen." *Ökonomenstimme*, published online at www.oekonomenstimme.org on July 1, 2014. (in German)
58. **Hoffmann, A. O. I.** & T. Post (2012). "Die Renditeillusion: Optimismus und Angst von Privatanlegern." *Ökonomenstimme*, published online at www.oekonomenstimme.org on January 20, 2012. (in German)
59. **Hoffmann, A. O. I.** & T. Post (2012). "Angst en Optimisme van Particuliere Beleggers." *Economisch Statistische Berichten*, 97 (4626), 10-12. (in Dutch)

60. **Hoffmann, A. O. I.**, T. Post & J. M. E. Pennings (2011). “Investorenverhalten während der Finanzkrise.” *Die Bank: Zeitschrift für Bankpolitik und Praxis*, 7 (Juli), 30-33. (in German)
61. **Hoffmann, A. O. I.**, T. Post & J. M. E. Pennings (2011). “Particuliere Beleggers en de Financiële Crisis.” *Economisch Statistische Berichten*, 96 (4604), 106-108. (in Dutch)
62. **Hoffmann, A. O. I.**, J. H. von Eije & W. Jager (2008). “De Beïnvloedbaarheid van Beleggers.” *Maandblad voor Accountancy en Bedrijfseconomie*, Januari/Februari, 62-71. (in Dutch)
63. **Hoffmann, A. O. I.** (2007). “Individual Investors’ Needs and the Investment Professional: Lessons from Marketing.” *Journal of Investment Consulting*, 8 (2), 82-93.

INVITED TALKS

2023: Victoria University of Wellington, La Trobe University, University of Missouri – Columbia, Monash University, NMIMS, Freie Universität (FU) Berlin, Stevens Institute of Technology, University of Groningen (RUG).

2022: Erasmus University Rotterdam: Research Symposium “The Spillover Effect of Crises – Understanding When and Why Crises Spread from one Organization to Another” (keynote speaker), Maastricht University: Marketing-Finance Symposium “The Whole is Greater Than the Sum of Its Parts (IV)” (keynote speaker), University of New South Wales (UNSW) Business School, Maastricht University, UNSW/USYD/UTS Joint Marketing Research Forum.

2021: University of Western Australia (UWA) Business School.

2020: ARC Centre of Excellence in Population Ageing Research (CEPAR) at University of New South Wales (UNSW).

2019: Auckland University of Technology (AUT).

2018: University of Western Australia (UWA) Business School, University of Queensland (UQ) Business School, Australian Securities and Investments Commission (ASIC) Research Forum: Building Financial Capabilities Together.

2017: University of Melbourne, Queensland University of Technology (QUT), Melbourne Institute of Applied Economic and Social Research, RMIT University, Flinders University College of Business, Government, and Law.

2016: Joint Research Centre of the European Commission (JRC) at Ispra.

2015: Leeds University Business School, University of Southampton Business School, University of East Anglia.

2014: Ghent University, Goethe University Frankfurt, Aalto University, Netherlands Authority for the Financial Markets (AFM: Autoriteit Financiële Markten), University of Mannheim, Centre for European Economic Research (ZEW).

2013: University of Münster.

2012: Aalto University.

2011: Santa Clara University.

CONFERENCES

Conference Presentations:

2024: Marketing Strategy Meets Wall Street Conference, INFORMS Marketing Science Conference.

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2019: Australian & New Zealand Marketing Academy Conference (ANZMAC), Australasian Finance and Banking Conference (AFBC).

2018: Annual Colloquium on Pensions and Retirement Research by CEPAR and the School of Risk & Actuarial Studies at UNSW Business School, Australian & New Zealand Marketing Academy Conference (ANZMAC).

2017: Accounting & Finance Association of Australia and New Zealand Conference (AFAANZ), Australian & New Zealand Marketing Academy Conference (ANZMAC), Australasian Finance and Banking Conference (AFBC).

2016: VU University Amsterdam: Research in Behavioural Finance Conference, Australasian Finance and Banking Conference (AFBC).

2015: Network for Integrated Behavioural Science (NIBS) Behavioural Science and Policy Conference, European Marketing Academy Conference (EMAC).

2014: University of Essex: ESRC Research Centre on Micro-Social Change (MiSoC) Workshop on Subjective Expectations and Probabilities in Economics and Psychology, University of Nottingham: Network for Integrated Behavioural Science (NIBS) Workshop on Household Financial Decision Making and Behaviour in Financial Markets, Tilburg Institute for Behavioral Economics Research (TIBER): Symposium on Psychology and Economics, Erasmus University: Research in Behavioural Finance Conference, Annual Meeting of the German Finance Association (DGF).

2013: European Retail Investment Conference, Annual European Conference of the Financial Management Association (FMA), Tilburg Institute for Behavioral Economics Research (TIBER): Symposium on Psychology and Economics.

2012: Centre for European Economic Research (ZEW): Conference on The Role of Expectations in Financial Markets, European Marketing Academy Conference (EMAC), Boulder Summer Conference on Consumer Financial Decision Making.

2011: European Retail Investment Conference, Annual Meeting of the German Finance Association (DGF), Netspar Pension Day.

2010: INFORMS Marketing Science Conference, European Marketing Academy Conference (EMAC).

2009: Netspar Pension Day, Marketing Strategy Meets Wall Street Conference, European Marketing Academy Conference (EMAC).

2008: Netspar Pension Workshop, European Financial Management Association Conference (EFMA), INFORMS Marketing Science Conference, European Marketing Academy Conference (EMAC).

Conference Discussions:

2019: Australasian Finance and Banking Conference at University of New South Wales.

2017: Accounting & Finance Association of Australia and New Zealand (AFAANZ) Conference.

2016: Australasian Finance and Banking Conference at University of New South Wales.

2014: Netspar Meeting on Pension Awareness, Information and Choices (“Pensioenbewustzijn, Informatie en Gemaakte Keuzes”), Netspar International Pension Workshop, Annual Meeting of the German Finance Association (DGF).

2013: European Retail Investment Conference, Annual European Conference of the Financial Management Association (FMA), Marketing Strategy Meets Wall Street III Conference.

2012: Netspar International Pension Workshop, Annual Meeting of the German Finance Association (DGF), Netspar Theme Conference: Field Experiments and Research on Pensions, Aging and Retirement, European Retail Investment Conference.

2010: Netspar Panel Discussion, Netspar Pension Day.

Conference Organization:

2024: Special Session at Marketing Science: “Moving Beyond Return on Marketing: New Perspectives on the Marketing-Finance Interface.”

2016: Special Session at EMAC: “The Marketing-Finance Interface: Interactions between Capital and Consumption Markets.”

2015: Marketing-Finance Symposium at Maastricht University: “The Whole is Greater Than the Sum of Its Parts III.”

2013: Marketing-Finance Symposium at Maastricht University: “The Whole is Greater Than the Sum of Its Parts II.”

2012: Special Session at EMAC: “Consumer Financial Decision-Making.”

2010: Special Session at Marketing Science: “Identifying Marketing Actions that Drive Financial Performance.”

2008: Marketing-Finance Symposium at Maastricht University: “The Whole is Greater Than the Sum of Its Parts.”

2007: Behavioral Finance Symposium at University of Groningen: “Investor Behavior and Stock Market Dynamics.”

Conference Program Committees:

2021: Australian & New Zealand Marketing Academy Conference (ANZMAC).

2019: European Marketing Academy Conference (EMAC).

2018: Academy of Marketing Science Annual Conference, American Marketing Association (AMA) Summer Conference, European Marketing Academy Conference (EMAC), American Marketing Association (AMA) Winter Conference.

2017: Australian & New Zealand Marketing Academy Conference (ANZMAC), American Marketing Association (AMA) Summer Conference, Accounting & Finance Association of Australia and New Zealand (AFAANZ) Conference, Annual Conference of the Swiss Society for Financial Market Research (SGF), European Marketing Academy Conference (EMAC).

2016: Accounting & Finance Association of Australia and New Zealand (AFAANZ) Conference, Annual European Conference of the Financial Management Association (FMA), European Marketing Academy Conference (EMAC).

2015: Annual Meeting of the German Finance Association (DGF), Annual European Conference of the Financial Management Association (FMA), European Marketing Academy Conference (EMAC).

2014: Annual European Conference of the Financial Management Association (FMA), European Marketing Academy Conference (EMAC).

2013: Marketing Strategy Meets Wall Street III Conference, American Marketing Association (AMA) Summer Conference, Annual European Conference of the Financial Management Association (FMA), European Marketing Academy Conference (EMAC).

2011: Annual Meeting of the German Finance Association (DGF).

Other Conference Activity:

2022: Academic advisor in Paper Development Workshop of the UNSW/USYD/UTS Joint Marketing Research Forum.

2020: Academic mentor in Doctoral Colloquium of the Australian & New Zealand Marketing Academy (ANZMAC).

2018: Academic mentor in Doctoral Colloquium of the Australian & New Zealand Marketing Academy (ANZMAC).

ACADEMIC AND PROFESSIONAL SERVICE

Editorial Review Boards:

- *Journal of Marketing* (2024 – now)

Associate Editor Roles:

- *European Journal of Marketing*, (2018 – 2023)

- *European Journal of Finance*, (2017 – 2019)

Ad-Hoc Reviewer:

American Economic Review, Accounting and Finance, Applied Finance Letters, Applied Marketing Analytics, Applied Research in Quality of Life, Archives of Public Health, Australasian Marketing Journal, Australian Journal of Management, Canadian Journal of Economics, Corporate Communications: An International Journal, Economic Analysis and Policy, Educational Gerontology, Emerging Markets Finance and Trade, European Journal of Finance, Finance Research Letters, Financial Markets and Portfolio Management, Frontiers in Psychology, International Journal of Bank Marketing, International Journal of Consumer Studies, International Journal of Information Technology & Decision Making, International Journal of Production Economics, International Journal of Research in Marketing, International Review of Economics and Finance, International Review of Finance, International Review of Financial Analysis, Journal of the Academy of Marketing Science, Journal of Artificial Societies and Social Simulation, Journal of Banking and Finance, Journal of Behavioral and Experimental Economics, Journal of Behavioral and Experimental Finance, Journal of Behavioral Finance, Journal of Business Research, Journal of Consumer Affairs, Journal of Consumer Marketing, Journal of Consumer Policy, Journal of Economic Behavior and Organization, Journal of Economic Psychology, Journal of Empirical Finance, Journal of Experimental Psychology: Applied, Journal of Financial Services Marketing, Journal of Health Communication, Journal of International Marketing, Journal of Marketing Management, Journal of Neuroscience, Psychology, and Economics, Journal of Retailing and Consumer Services, Journal of Services Marketing, Journal of Population Ageing, Managerial Finance, Managing Service Quality, North American Journal of Economics and Finance, Psychology and Marketing, Public Relations Review, Research in International Business and Finance, Review of Behavioral Finance, Review of Finance, Review of Financial Studies, Technological Forecasting and Social Change.

Grant Review Committees:

- Netspar Theme Grants, Network for Studies on Pensions, Aging and Retirement (Netspar) (2023).

- Social Sciences and Humanities Projects Scheme, Swiss National Science Foundation (2023).

- Personal Research Funding Scheme, Estonian Research Council (ETAg) (2017).
- Insight Grants Program, Social Sciences and Humanities Research Council of Canada (2016).
- Personal Research Funding Scheme, Estonian Research Council (ETAg) (2016).
- Expert Panel Economics, Business Economics, and Management, Research Foundation – Flanders (2016).
- Expert Panel Economics, Business Economics, and Management, Research Foundation – Flanders (2015).
- Insight Grants Program, Social Sciences and Humanities Research Council of Canada (2015).
- Insight Grants Program, Social Sciences and Humanities Research Council of Canada (2014).
- Insight Grants Program, Social Sciences and Humanities Research Council of Canada (2013).

Tenure and Promotion Reviewing:

- External referee for promotion application to Associate Professor at research-intensive (Go8) university in Australia (2024).
- External referee for promotion application to Full Professor at research-intensive (Go8) university in Australia (2023).
- External referee for Tenure and Promotion application at research-intensive (R2) university in United States (2023).
- External referee for promotion application to Senior Lecturer at research-intensive (Go8) university in Australia (2023).
- External referee for promotion application to Senior Lecturer at Russel Group university in United Kingdom (2023).
- External referee for promotion application to Associate Professor at research-intensive (Go8) university in Australia (2022).
- External referee for promotion application to Senior Lecturer at Russel Group university in United Kingdom (2021).
- External referee for promotion application to Full Professor at research-intensive university in Australia (2021).
- External referee for promotion application to Associate Professor at research-intensive university in Australia (2021).
- External referee for promotion application to Associate Professor at research-intensive university in New Zealand (2019).
- External referee for promotion application to Associate Professor at research-intensive (Go8) university in Australia (2018).

Other Academic Reviewing:

- External expert evaluating candidate for appointment as Full Professor at research-intensive university in Estonia (2022).
- Thesis review panel for AACSB-NVAO accreditation of a research-intensive university in the Netherlands (2022).
- External referee for lead applicant in Leverhulme Small Research Grants scheme of the British Academy (2021).
- External referee for PhD project proposal at Wageningen University School of Social Sciences (WASS) (2019).
- Peer reviewer for Australian Research Council's Excellence in Research for Australia (ERA) framework (2018).

DEPARTMENTAL AND UNIVERSITY SERVICE

University of Adelaide:

- Marketing Discipline Leader / Department Head Marketing (2021 – now).
- Member of Adelaide Business School Executive Committee (2021 – now).
- Member of Higher Degree by Research (HDR) / Ph.D. Committee (2018 – 2021).
- Member of Research Committee of Adelaide Business School (2018 – 2021).
- Higher Degree by Research (HDR) Director / Ph.D. Coordinator (2018 – 2021).
- Member of School of Marketing and Management Research Committee (2017).
- Search Committee Chair and Member of Various Selection Panels (2017 – now).

Maastricht University:

- Director of M.Sc. program in International Business: Marketing-Finance (2015 – 2016).
- Member of Educational Program Committee of School of Business and Economics (2013 – 2016).
- Member of Editorial Board of Maastricht University Magazine (2011 – 2014).
- Founding Co-Director of Marketing-Finance Research Lab (2009 – 2016).
- Founding Co-Director of Marketing-Finance Company Circle (2008 – 2016).
- Founding Co-Director of M.Sc. program in International Business: Marketing-Finance (2008 – 2015).

TEACHING EXPERIENCE

University of Adelaide:

- Understanding Consumers (M.Sc. program, 2017 - now)

Average student evaluation:

6.17 out of 7 (“Overall, I am satisfied with the quality of this course” 1 = strongly disagree, 7 = strongly agree) *

- Service Design and Marketing (B.Sc. program, 2019 - now)

Average student evaluation:

6.13 out of 7 (“Overall, I am satisfied with the quality of this course” 1 = strongly disagree, 7 = strongly agree) *

- Services Marketing (B.Sc. program, 2017 - 2018)

Average student evaluation:

6.04 out of 7 (“Overall, I am satisfied with the quality of this course” 1 = strongly disagree, 7 = strongly agree) *

- Contemporary Issues in Marketing (B.Sc. program, 2018 - now). †

- Advanced Marketing Theory (B.Sc. Honors program, 2019 - now). †

Maastricht University:

- Shareholder Value and Market-Based Assets (M.Sc. program, 2008 - 2015)

Average student evaluation:

8.04 out of 10 (“Please give an overall grade for the quality of this course” 1 = very bad, 10 = very good) *

- Behavioral Finance (M.Sc. program, 2007 - 2015)

Average student evaluation:

7.70 out of 10 (“Please give an overall grade for the quality of this course” 1 = very bad, 10 = very good) *

- Behavioral Corporate Finance (Executive MBA program, 2009 - 2016) †

- Financial Markets (M.Phil. program, 2010 - 2016) †

University of Groningen:

- Principles of Marketing (B.Sc. program, 2005 - 2007) †

* Detailed course evaluation available upon request.

† No student evaluation available for this course.

THESIS ADVISING AND EXAMINING

Ph.D. Thesis Advising:

- Hoang Long Bui (University of Adelaide): committee co-chair (“co-supervisor”).

- Lachlan Schomburgk (University of Adelaide): committee chair (“principal supervisor”).

- Dietrich Silber (University of Adelaide): committee chair (“principal supervisor”).

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- Janin Hentzen (University of Adelaide): committee chair (“principal supervisor”). Thesis title: “Technology-Facilitated Customer Engagement and Actor Networks in Financial Services: A Retirement Planning Perspective” (completed in 2022).
- Ayoosha Saleem (University of Adelaide): committee chair (“principal supervisor”). Thesis title: “Advancing the Understanding of Family Businesses’ Psychological Foundations” (completed in 2021).
- Shujie Liu (University of Adelaide): committee co-chair (“co-supervisor”). Thesis title: “Advertising’s Financial Market Outcomes” (completed in 2021).
- Patrick Gerhard (Maastricht University): committee co-chair (“co-supervisor”). Thesis title: “Essays on Financial Decision Making: How Households Save, Invest, and Dissave” (completed in 2019).
- Simone Wies (Maastricht University): committee co-chair (“co-supervisor”). Thesis title: “Stock Market Dynamics of Marketing Decision-Making” (completed in 2013).

Ph.D. Thesis Examining:

- Nathan Wang-Ly (UNSW Sydney and CEPAR). Thesis title: “Saving Decisions Under Uncertainty” (2023).
- Xing (Alison) Chen (Massey University). Thesis title: “Modelling the Co-Dependent Diffusion of Innovation in Two-Sided Markets” (2022).
- Pieter Verhallen (Maastricht University). Thesis title: “No, They Didn’t? Oh, They Did! Advancing Insights on Social Norm Interventions in Consumer Financial Decision-Making” (2021).
- Ron van Schie (Erasmus University Rotterdam). Thesis title: “Planning for Retirement: Save More or Retire Later?” (2017).
- Nicolas Dierick (Ghent University). Thesis title: “Using Transaction Data to Examine the Drivers of Investment Behavior for Different Groups of Investors” (2016).
- Benjamin (Bing) Radoc (University of East Anglia). Thesis title: “Validating the Predictions of Case-Based Decision Theory” (2015).
- Alex Klein (Nyenrode Business University). Thesis title: “Marketing As Value-Leverage: Does Marketing Contribute to Firm Performance via Process Improvement?” (2015).
- Mitch Tolo (Aalto University School of Business). Thesis title: “Marketing Investment Selection and Effectiveness in Growth-Oriented Private Firms: Source of Capital and Market-Based Assets as Contingencies” (2014).
- Sajid Chaudry (Maastricht University). Thesis title: “Essays on International Banking and (In)Stability in Financial Markets” (2013).
- Nikos Kalogeras (Maastricht University). Thesis title: “Essays on Individual Decision Making: With Special References to Agribusiness & Food Markets” (2011).

M.Phil. Thesis Advising:

- Gary He (University of Adelaide): committee co-chair (“co-supervisor”).
- Rebecca Chan (University of Adelaide): committee co-chair (“co-supervisor”). Thesis title: “Open Banking: Does it Open Up a New Way of Banking?” (completed in 2020).

M.Sc. Thesis Advising:

The selection below only includes M.Sc. theses which resulted in a peer-reviewed publication with the advised student.

- Katarina Otteby (Maastricht University): committee chair (“principal supervisor”). Thesis title: “Antecedents of Consumer Intention to use Personal Finance Blogs and their Perceived Helpfulness” (completed in 2016).
- Dana Ketteler (Maastricht University): committee chair (“principal supervisor”). Thesis title: “Emotions in (Financial) Decision-Making: Influence of Trading a Company’s Stock on Investors’ Purchasing Behavior” (completed in 2014).
- Cornelia Birnbrich (Maastricht University): committee chair (“principal supervisor”). Thesis title: “The Impact of Fraud Prevention on Bank-Customer Relationships: An Empirical Study in Retail Banking” (completed in 2012).
- Aida Tutic (Maastricht University): committee chair (“principal supervisor”). Thesis title: “The Role of Educational Diversity in Investor Relations” (completed in 2010).
- Heiner Franken (Maastricht University): committee chair (“principal supervisor”). Thesis title: “Determinants of Customer Intention to Adopt a Fee-Based Advisory Model: An Empirical study in Retail Banking” (completed in 2010).
- Tobias Fischer (Maastricht University): committee chair (“principal supervisor”). Thesis title: “Behavioural Aspects of Covered Call Writing: An Empirical Investigation” (completed in 2010).
- Sam Henry (Maastricht University): committee chair (“principal supervisor”). Thesis title: “Aspirations and Risk Behavior over Time: An Experimental Investigation” (completed in 2009).
- Simone Wies (Maastricht University): committee chair (“principal supervisor”). Thesis title: “Marketing’s Role in Investor Relations Management” (completed in 2009).

B.Sc. Honors Thesis Advising:

- Anant Srivastava (University of Adelaide): committee chair (“principal supervisor”). Thesis title: “Gambling and Trading Adverts: A Theoretical Perspective on Attitudinal Shifts” (completed in 2021).
- Lachlan Schomburgk (University of Adelaide): committee chair (“principal supervisor”). Thesis title: “How Mindfulness Alleviates Consumers’ Buy-Now-Pay-Later-Usage and its Association with Financial and Overall Well-Being” (completed in 2021).

B.Sc. Honors Thesis Examining:

- Panayoti Dionysios Psorakis (University of Adelaide). Thesis title: “What is the Role of Organizational Readiness for Market Shaping?” (2021).
- Georgia Wastell (University of Adelaide). Thesis title: “Cancelled Influencers: Investigating Impacts on the Endorsed Brands” (2021).

PEDAGOGICAL TRAINING

- 2017: *Learning Analytics* (University of Adelaide)
2017: *Supervision of Doctoral Studies* (University of Adelaide)
2016: *Aboriginal Cultural Awareness* (University of Adelaide)
2016: *Mental Health Awareness* (University of Adelaide)
2010: *University Teaching Qualification* (Maastricht University)
2008: *Supervision of PhD Students* (Maastricht University)
2008: *Problem-Based Learning* (Maastricht University)

CONSULTING EXPERIENCE

- 2019: ASIC (I am a member of ASIC's Financial Capability Research Steering Committee)
2019: Dreams Nordic AB (I am a member of Dreams Nordic AB's Scientific Advisory Board)
2018: European Commission (I advised about marketing and distance selling of retail financial services)
2018: ASIC MoneySmart (I advised regarding the National Financial Capability Research Roadmap)
2016: European Commission (I advised about behavioral aspects of retail investor decision-making)
2015: Fidelity International (I developed an executive teaching program for pension fund board members)
2014: ING Private Banking (I advised regarding new developments as to private wealth management)
2014: Meetinvest AG (I advised regarding the introduction of a financial social media platform)
2014: Netherlands Authority for the Financial Markets (I advised on behavioral biases of execution-only investors)
2014: Deluxe Corporation (I advised regarding marketing aspects of a financial service innovation)
2011: Deutsche Postbank (I advised on fraud prevention measures and customer relationship management)
2010: Sparkasse KölnBonn (I advised about new developments in the marketplace for retail financial advice)

HONORS AND AWARDS

- 2023: *Best Paper in Track Award - Consumer Behavior* (ANZMAC Conference)
2022: *Top Cited Article Award* (Journal of Consumer Affairs)
2021: *Excellence in Research Award* (University of Adelaide)
2021: *Excellence in Interdisciplinary Research Collaboration Award* (University of Adelaide)

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2019: *Excellence in Research Award* (University of Adelaide)

2016: *Outstanding Paper Award* (International Journal of Bank Marketing)

2015: *Excellent Graduate Educator Award* (Maastricht University)

2014: *Academic Leadership Program “Fast Forward”* (Maastricht University)

2013: *Outstanding Paper Award* (International Journal of Bank Marketing)

2011: *Academic Leadership Program “Steep Face”* (Maastricht University)

2009: *Departmental Excellence in Teaching Award* (Maastricht University)

GRANTS AND RESEARCH INCOME *

2022: *Kickstart Grant* AUD 5,000 (University of Adelaide).

2021: *Automotive Product Stewardship Grant* AUD 2,000 (joint industry/government project).

2021: *AC21 Special Project Fund* USD 15,000 (Academic Consortium for the 21st Century).

2017: *Priority Partner Funding* AUD 5,000 (University of Adelaide).

2008: *Small Scale Research Grant* EUR 4,000 (Maastricht University).

* Excludes departmental data collection funding, travel grants, and start-up funds.