Market Orientation as a Branding Strategy

by

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ABSTRACT

This paper studies the impact of market orientation strategy on brand awareness. Zara, a Spanish leading fashion retailer and an example of a brand using this strategy, is compared to three other multinational brands operating in Stockholm, Sweden, namely Topshop, Mango and United Colours of Benetton. The latter brands are known to use advertising to create brand awareness.

Fashion magazine attention was used as a measure of brand awareness. Data on the brand awareness was gathered by browsing three leading Swedish fashion magazines – Elle, Glamour and Damernas Värld – and the fashion section of the biggest Swedish tabloid, Aftonbladet.

It was found that market orientation can compete with advertising as a marketing strategy to create brand awareness, but only in part of the market segment. This was concluded from the fact that Zara was featured in some of the magazines, but not all of them.
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HARRIET MELLENIUS
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INTRODUCTION

The fashion market has changed considerably over the past few decades. Fashion brands that used to be markers of luxury and exclusivity, such as Dior and Louis Vuitton, are now middle-market.¹ This change came about as the luxury fashion retailers were introduced on the stock market. New owners with new demands on return on investment and the new possibility of cutting production costs by transferring the production to China were the two main reasons behind the continuously lowered prices.

Even though this change opened up the market to new groups of consumers, the competition between the retailers increased as new participants of the fashion market were introduced. Due to these factors, it is getting harder and more complicated for agents involved in fashion to stand out in the industry. Creating value for the customer by successful marketing tools has become vital.

It is equally important for the customer to recognise the existence of a brand and its products or services. This is called *brand awareness*. Creating brand awareness is one of the key steps in promoting a product. The product that maintains the highest brand awareness compared to the competitors usually get the highest sales.²

Advertising is the most common way of communicating a new product, brand or concept in the market. Many companies spend millions on advertisement to introduce a new product or even to remain competitive in the business industry. Three brands that rely on advertising in their market communication and that will be examined in this paper are United Colours of Benetton, Mango and Topshop.

This paper will also cite a marketing strategy that could be an alternative to advertising. It is the *market orientation strategy*, used by the fashion retailer Zara. Despite Zara being one of Europe’s leading clothing brands, they claim not to have a formal marketing department, and

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¹ Eder-Ekman 2007

² Brand Awareness n.d.
do not use advertising to promote their products. The competitive advantage is instead maintained by their market orientation strategy.

Market orientation refers to the organisation-wide focus on the collecting and coordination of market intelligence and making the organisation culture commit systematically and completely to the continuous response to customer demands. The strategy is more than just a marketing strategy as it involves the organisation of both the company and its customers.

In the Zara case, not only is the market orientation used as the most important strategy to gain competitive advantages, but also as a branding strategy. I want to investigate whether market orientation as a branding strategy works as well as advertising in creating awareness of the brand. Can market orientation as a marketing strategy evoke the same amount of brand awareness as advertising?

I will use media attention from three Swedish fashion magazines, Elle, Damernas Värld and Glamour, and the fashion division of the leading Swedish tabloid, Aftonbladet, as a measure of brand awareness. As a reference, I will compare Zara to three other multinational clothes retailers with a few stores in Sweden that uses advertising to create brand awareness, namely United Colours of Benetton, Mango and Topshop.

To get a better understanding of the whole paper, the following concepts will be clearly defined: brand awareness, fashion media, advertising and market orientation. Then, the model which is used in this study will be featured.

**THEORETICAL FRAMEWORK**

**BRAND AWARENESS**

“A product is something that is made in a factory; a brand is something that is bought by a customer. A product can be copied

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3 Slater & Narver 1994

4 Mazaira, González & Avendaño 2003
There are many definitions of a successful brand. According to Ossiansson (2004, p. 68), a successful brand is “an identifiable product, service, place or relationship, augmented through brand processes in such a way that the brand buyer or user perceives relevant, unique, sustainable added values from or together with the brand supplier and seller that match their needs most closely”.\footnote{Ossiansson 2004, p. 68} A strong brand is an asset that needs continuous investments otherwise it will decline.

Ossianssson further declares that one important aspect of the brand is the \textit{augmented level}. The augmented level of a brand adds value to the product by not only satisfying the customer’s functional needs, by filling the product’s intended functional purpose, but also by satisfying the non-functional needs. Non-functional needs are the customer’s problems on a psychological level that the product may solve.\footnote{Ossiansson 2004, p. 69}

However, a brand cannot create customer value until it is known by its target market. The mass public must be aware that a certain brand exists and is offering a certain type of products. This is called \textit{brand awareness}.

Brand awareness can be defined in the following ways:\footnote{The New Age of Brand Awareness 2005}

- Building momentum; to make the target customers notice the brand’s name
- Sustaining momentum; to make the target customers remember the brand’s name
- To get public attention by positive word of mouth
- Creating mental associations between the brand and its products
- Building credibility
- Building an attractive image of the brand

\textit{by a competitor; a brand is unique. A product can be quickly outdated; a successful brand is timeless."} \hspace{1cm} \textit{Stephen King}
\hspace{1.2cm} \textit{WPP Group, London}
Brand communication can occur through marketing communications vehicles such as advertising and public relations. One aspect of public relations is mass media attention. This study will focus on media attention in fashion magazines. Exposure of fashion brands in fashion magazines was chosen as a way of measuring brand awareness.

**FASHION MEDIA**

According to Janssen (2006), in the twentieth century fashion has become one of the cultural forms – like film, art or music – that have gained a higher editorial status in the press. Janssen further adds that fashion news get more attention and more emphasis in the newspapers now than 20 years ago. An eye-catching catwalk can nowadays be noticed to be featured at the front page of an ordinary daily newspaper.8

*Fashion journalism* is a composite term used about all different kinds of published fashion media. This includes not only fashion magazines and fashion news stories in newspapers, but also television, books, websites and blogs. Fashion write-ups are a form of publicity that will help the fashion retailers in exposing their products to the concerned public, and thus promote brand awareness. However, the branding strategy must first succeed in attracting attention from fashion journalists. Thus fashion media exposure is not only a valuable mean in the branding strategy, but also an expression of the success of the marketing strategy. This study will use the latter function of fashion media to measure the effect of two different branding strategies; advertising and market orientation.

**ADVERTISING**

Advertising is a persuasive message about a product or service, with the intention of affecting the recipients’ view of the product or service. It is released through some medium of mass communication. Advertising is one of several marketing communication options available to a company, but one of the most commonly used.

Another aspect of the persuasiveness of advertising is that it can be used not only to influence the customer’s preferences, but also to create a false need for a specific product. True needs

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8 Janssen 2006
are the basic needs of food, shelter and clothing. All other needs, the false needs, are products of the cultural environment that we belong to. According to some scholars, advertising is to blame for the idea that those needs can be fulfilled with the consumption of the right products while in fact, what gives humans most satisfaction are nonmaterial values.\textsuperscript{9}

Russell and Lane (1996, p. 61) states that it is often difficult to determine the reasons behind a company’s choice of advertisement. However, in a number of situations, advertising might be particularly useful. Those are when a new product is to be released, when competition is severe or when some change in the company or in the product needs to be publicly noticed.\textsuperscript{10} The role of advertising includes the communication functions of generating brand awareness and creating brand preference.\textsuperscript{11}

There are four steps of understanding that a customer must take in order to intentionally buy a specific product of a specific brand. First, the customer needs to be aware of the brand. Second, he or she needs to understand what kind of problem this product will solve for him or her. Third, the customer needs to be convinced that this is the right product for solving that specific problem, and fourth – the customer must conduct the purchase.\textsuperscript{12} Advertising that takes the customer through these four steps results, directly or indirectly, in sales.

Thus successful branding helps the customer to identify a manufacturer of preference. This study will measure the ability of a branding strategy based on advertising to make fashion journalists recognise and choose the advertised brand.

\textit{MARKET ORIENTATION STRATEGY}

The main interest in this thesis is to determine whether market orientation succeeds in getting brand awareness without using advertising. According to articles about one of my subjects, Zara, this strategy is widely used by the said brand and the brand owner Inditex proudly de-

\textsuperscript{9} Leiss et al. 2005, pp. 83-4  
\textsuperscript{10} Russell & Lane 1996, p. 61  
\textsuperscript{11} Russell & Lane 1996, p. 31  
\textsuperscript{12} DeFleur & Dennis 1998, p. 326
clared that it hardly uses any advertising to sustain competitive advantage in the fashion in-
dustry.

The market orientation strategy is based on the idea that creating customer value is the only
cogent business purpose. A company using market orientation always gives the customer’s
interest and the fulfilment of customer demands the highest priority. According to the market
orientation theory, the creation of supreme customer value is the only way to achieve long-
term competitive advantage and profitability.\(^\text{13}\)

To maintain an organisation-wide customer focus, the company using market orientation
needs a high degree of vertical integration. Market intelligence must be distributed to all links
in the chain of design, production and distribution. The responsibility of the execution of
marketing goals does not lie only on the marketing department, but on every department in
the business. This is why market orientation is more than just a marketing strategy. Neverthe-
less, marketing is an important quality of the market orientation.

Kohli and Jaworski (1990) suggest that “market orientation entails (1) one or more depart-
ments engaged in activities geared toward developing an understanding of customers’ current
and future needs and the factors affecting them (2) sharing of this understanding across de-
partments, and (3) the various departments engaging in activities designed to meet selected
customer needs. In other words, a market orientation refers to the organizationwide gener-
ation, dissemination and responsiveness to market intelligence”.\(^\text{14}\)

In a broader definition, the market-oriented business has an organisation culture that supports
the gathering and distribution of market intelligence. Market intelligence includes information
on customers and competitors as well as other factors that significantly affect the market. The
company’s reactions to this information will create superior customer value.

The three main components of a market orientation strategy are customer orientation, com-
petitor focus and inter-functional coordination.\(^\text{15}\)

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\(^\text{13}\) Mazaira, González & Avendaño 2003

\(^\text{14}\) Kohli & Jaworski 1990, p. 3

\(^\text{15}\) Narver & Slater 1990
Customer Focus

Customer focus means that the vendor fully understands every aspect of the customer, including the customer’s own value chain. Customer value is not superior unless it is maximised for both the first-hand customer and the customer’s customers. Furthermore, the market-oriented company needs to understand the dynamics of the networks that the customers belong to. Only then can the selling company comprehend both current and future customer demands.16

The customer value includes the service offered before and after sales. This gives employees with customer contact significant responsibilities. Moreover, they are the ones with first-hand customer information. Because of this, managers and employees must work hand in hand to maintain superior customer value, which is part of the interfunctional coordination. Careful hiring and regular training is needed to retain the best people in the company.17

Competitor Focus

Market-oriented companies must not focus only on its customers in order to create superior customer value. They should also consider the competitors, the technology they use and market attitudes towards them.18 Firms that focus on their competitors in the analysis of their external market are called “marketing warriors”. The marketing warriors analyse themselves in the light of the competitors, concentrating on their strengths and weaknesses relative to the competitors.19

To add, in market-driven businesses, employees from all departments share information about competitors and discuss this to gain a good insight in the competitor’s strengths and weaknesses. This information can be used to quickly counteract the competitor’s actions and turn the situation into competitive advantage.20 An example of this was Zara’s international

16 Narver & Slater 1990
17 Slater & Narver 1994
18 Slater & Narver 1994
19 Heiens 2000
20 Slater & Narver 1994
launching of “Online Zara Home” in October 2007, before H&M had launched its H&M Home division.

**Interfunctional Coordination**

The last important part of market orientation is the coordination of resources, information and people in the company. Every unit in the organisation must be a well-defined part of these resource fluxes, and every employee, regardless of the job description in the company, must be aware of the role he plays in the context of the organisation.\(^{21}\)

Kohli and Jaworski (1990, p. 13) comment on an additional advantage of market orientation; that “market orientation facilitates clarity of focus and vision in an organisation’s strategy.”\(^{22}\) The market orientation puts emphasis on the common goals of the company which unites the individual and the departmental goals and activities in the organisation. This facilitates the coordination and communication in the organisation, as personal achievements become subordinate to the company’s achievements.\(^{23}\)

**Market orientation and branding**

The tools of creating brand awareness of a market orientation strategy are not as clear as the tools used in advertising. Brand awareness is supposed to be created as a “side effect” of the attention the brand gets for being superior due to customer and competitor focus. As explained above, the means of creating this superior customer value are communication within the organisation, quick response to customer demands and profiting on the competitors’ weaknesses. The means of communicating the superior value to the customer is through product assortment and quality, service, prices and facilities. This paper will investigate whether this communication works as well as communication through advertising in creating brand awareness.

**MODEL**

It has been stated above that brand awareness is one of the aims of a company’s marketing strategy, as it increases the brand’s value and could enhance sales. Creating brand awareness

\(^{21}\) Slater & Narver 1994  
\(^{22}\) Kohli & Jaworski 1990, p. 13  
\(^{23}\) Kohli & Jaworski 1990
is clearly one of the most important aspects of advertising. Some companies, such as Zara in this case, use market orientation as an alternative to the specific marketing tool, advertising.

Can a company using market orientation as a marketing strategy create the same level of brand awareness as those companies using advertisements? On a market where competition of customer attention is high, such as in clothes retailing, brand awareness is a vital competitive advantage. Hence, I hypothesize that equally successful companies, of approximately the same size, and which target the same customers, should aim for the same level of brand awareness.

Media attention is closely related to brand awareness, both by drawing more attention to the brand and as an indicator of awareness, as the media people need to notice the brand in order to feature it. I further hypothesize that market orientation as a branding strategy can attract levels of media attention comparable to advertising, as the media attention is used as an expression and a way to measure their respective brand awareness. The main structure of my model is as follows:

This model shows how the effects of advertising and market orientation strategy can be compared in relation to the level of media attention the brand gets, which impliedly connotes brand awareness. The representatives of brands using market orientation or advertising that I have chosen are approximately equally big and successful, and targeting the same group of customers. According to my hypotheses, these brands should get the same levels of media attention.

**METHODODOLOGY**
In order to investigate the branding aspects of market orientation, I will use Zara as case object and United Colours of Benetton, Mango and Topshop as objects for advertised brands.

**MARKET ORIENTATION STRATEGY**

**Zara**

Zara is the flagship brand of the Spanish fashion manufacturer and retailer Inditex, or Industria de Diseño Textil. Zara offers international fashion and distributes men’s, women’s and children’s clothes tagged at medium to low prices, with quality being medium to high. At present, Zara has 1,129 stores worldwide and is located in 68 countries, including Sweden.\(^{24}\) They opened their first store in Stockholm in 2003.\(^ {25}\) Now, in the beginning of 2008, there are four Zara stores in Stockholm.

Zara has gained attention in business academia for its successful implementation of market orientation. The whole business model of Inditex is characterised by a high degree of vertical integration and very short lead times. Zara even claims not to have a need for a formal marketing department, as they use market orientation as a marketing strategy.\(^ {26}\)

Nor does Zara exhibit their garments at the catwalk; the new products are introduced directly in the stores. Instead, Inditex makes big investments in prime locations and its store layouts as the company wants all their stores to be attractive on the outside and the inside. The company image is projected in the carefully designed storefronts. All the stores are located in prime locations in big city districts. The average store size is 1,376 square meters and makeovers of old stores are done every 3-4 years.\(^ {27}\)

The design of Zara’s fashion items is not original, but influenced by ready-to-wear fashion shows in Paris, New York, London, and Milan, luxury brand catalogues, popular culture and street fashion. The planning of the design of every new collection starts only nine months

\(^{24}\) The Zara Concept at Inditex’ website n.d.

\(^{25}\) Nilsson, Forén & Carlsvi 2004

\(^{26}\) Mazaira, González & Avendaño 2003

\(^{27}\) Zara: Fast Fashion 2003
before the start of the season. This allows the designers to rapidly adapt the collection to new market trends.²⁸

Moreover, Zara’s drawing power focuses on creating artificial scarcity of its products. The manufacturer produces only a few items of each design and the stocks are replenished two times a week to imply constant freshness of the atmosphere of the store. Customers will be forced to buy the product instantly when they visit the store, because the product will not be there next time. In this way, it is relatively easy for Zara to discover slow moving items and cancel further future planned production of a certain design.²⁹

For Zara, those are the key tools of gaining public attention and brand awareness. Note that they do not influence the target group’s image of the brand through direct communication, but instead they indirectly create brand awareness by making a good impression.

**ADVERTISING STRATEGY**

The brands I will compare Zara to are United Colours of Benetton, Mango and Topshop. Those were chosen for being comparable to Zara in various ways and for using advertising in their marketing strategy.

**Benetton**

United Colours of Benetton was chosen because it has a relatively small number of stores in Stockholm – three, comparable to Zara’s four – while being a large multinational brand.³⁰ Benetton is also well-known for its lavish advertisements, which on occasion has been intentionally shocking to draw attention to the brand.³¹ Finally, Benetton produces garments for a target group similar to Zara’s, so that they could compete of the same space in the fashion reportages.

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²⁸ Zara: Fast Fashion 2003
²⁹ Zara: Fast Fashion 2003
³⁰ United Colours of Benetton’s website n.d.
³¹ Website of Marknadsetiska Rådet n.d.
Mango

Mango has a history comparable to Zara’s, being a Spanish company with approximately the same number of stores in the same number of countries worldwide, and a recent history of great success – the first Mango store opened in 1984.\(^{32}\)

Like Zara, all the Mango stores are located in prime positions, whether in the main shopping centres or in premises located in city centres. Stores are of a sufficient size to display its collections. The products of Mango are also similar to Zara’s in style, pricing and quality. However, Mango is very different from Zara in organisational strategy as Mango is based on a franchising system, and in marketing strategy, relying heavily on advertising campaigns; one example being the autumn/winter 2007 campaign with international movie star Penélope Cruz. There is only one Mango store in Stockholm.

Topshop

Topshop is comparable to Zara because of its size in Stockholm and its target market. Although not of same international magnitude as Benetton and Mango, Topshop operates in 28 countries. There are two Topshop stores in Stockholm, of which one is notable for being the biggest Topshop flagship store outside UK.\(^{33}\)

Furthermore, the promotion of Topshop is based on advertising and sponsoring of events. Topshop also gained much media attention in 2007 when they released a collection designed in collaboration with international top model Kate Moss.

METHOD

In the analysis, market orientation will be compared to advertising in getting brand awareness using a quantitative method. The exposure of each of the chosen brands in the fashion media will be tallied as a measure of public awareness of the sampled brand. The period I have chosen to investigate is the year 2007. The period was chosen because I wanted to explore the current situation, and because the time constraints of the study did not allow me to cover a

\(^{32}\) Mango’s economic dossier n.d.

\(^{33}\) SO UK’s website n.d.
bigger time span. The exposure of the group of brands using advertising (Benetton, Mango and Topshop) will be compared to the brand using market orientation (Zara).

The fashion media attention is not only a measure of the brand awareness that the marketing is creating, but also important for the company’s sales through the journalists’ impact on the consumers. This study will use the fashion division of one of Sweden’s biggest tabloids, Aftonbladet, and the three most significant Swedish fashion magazines; Elle, Damernas Värld and Glamour. I aim to answer whether Zara’s marketing strategy can attract the attention of fashion journalists in Sweden, in competition with advertised brands.

**Fashion Media**

Aftonbladet was chosen because it has a very popular fashion division that reaches a great number of readers – Aftonbladet’s fashion website has 176,000 unique visitors per week. Furthermore, 813,000 people also have access to the fashion articles in the paper editions of the said newspaper. What makes the newspaper interesting is that the fashion brands seldom have specific advertisements in the fashion divisions directed toward fashion consumers. In the analysis, all exposures from 2007-01-01 to 2007-12-07 are included.

The fashion magazines, on the other hand, are full of advertisements from various fashion brands. Even though the journalists most likely do not sell the advertising space themselves, there is a risk that they are influenced to give more attention to those brands. I will therefore give notice to any advertisements from the brands that I am investigating in the magazines, even though I have no knowledge of their advertising history. The three magazines Elle, Damernas Värld and Glamour were chosen because all three of them have a pronounced fashion profile and are likely to attract readers with a fashion interest, and because they are popular magazines with monthly editions of about 85,000, 112,000 and 65,000, respectively. Every 2007 issue from all three magazines is included in the analysis.

34 Aftonbladet’s advertising website n.d.
35 Elle’s website n.d.
36 Damernas Värld’s division of Bonnier publishing’s website n.d.
37 Glamour division of Bonnier publishing’s website n.d.
**Data gathering**

The research will be conducted by browsing the said magazines and newspaper and counting the number of times these four brands are mentioned during the year of 2007, and in what form or context they are being featured. Only *women’s fashion* will be included in the analysis, both because this is the main focus of the fashion magazines and because the four chosen brands are comparable only in this aspect.

**ANALYSIS OF DATA**

The data exposed major differences between the different magazines as well as the different brands. When considering only the total number of exposures for the different brands, one may get the impression that Zara is doing well in the competition. Topshop is the clear winner with 58% of total media attention. Note that “total exposure” in this case means only the total exposure of these four brands.

![Figure 2. The shares of total media attention of each of the four brands.](image)

Zara and Benetton seem to be equally successful with 17% and 19% respectively, and Mango gets the least media attention with only 6% of total exposures. The mean exposure of the advertised brands is 28% of the total exposure, somewhat higher than Zara’s 17%, but still a comparable level. However, when looking at the numbers from each of the four fashion media, the ambiguousness of the results is obvious.
Zara gets half of its total exposures from the tabloid section Aftonbladet Mode, while Benetton gets more attention from the magazines. More curiously, during 2007 Zara was never featured with a picture in the magazine Damernas Värld! The only attention Zara got in this magazine during the whole year was a mention in text, once.

**DIFFERENT MEDIA**

The three magazines and the tabloid fashion section are likely to have slightly different target groups, which should be reflected in the collection of brands that they choose to feature. Nevertheless, as the four brands in this investigation have approximately the same target customers, I did not expect such big differences between the magazines.
Topshop is the most popular brand in all four papers, albeit tying with Benetton in Damernas Värld at 28 exposures. Topshop is clearly one of the “trendy” brands of the moment. The successful branding is not only due to superior advertising, but also to how Topshop has affiliated successful designers and celebrities. One of those is Swedish designer Ann-Sofie Back, who was awarded with “Guldknappen”, Damernas Värld’s prize for best Swedish designer, in 2007 and has designed her own collection for Topshop. Topshop has succeeded in creating an image of the brand being trendy and fashionable.

Aftonbladet Mode differentiates from the others by giving Zara many exposures, and featuring Benetton and Mango only scarcely. Damernas Värld is different from the others for giving Benetton the same amount of attention as Topshop. Mango is the third brand with only 8%, as Zara is hardly featured at all. The distribution of exposure between brands is very similar for Glamour and Elle.

To explain those differences is difficult. There are most likely many explanatory factors involved. Differences in price or style can not explain Aftonbladet’s heavy focus on Topshop and Zara, as they are comparable in both price and style to Mango and Benetton.
Aftonbladet Mode does not display any fashion-specific advertisements, neither in the paper issue nor at the website. Perhaps this is favourable for Zara. In an environment with no advertisements, it is not unreasonable that the marketing strategy not based on advertising would be more successful. This would imply that Zara’s marketing strategy is sufficient for building momentum in the target group, but not sustaining momentum in competition with advertised brands.

Even more remarkable is why Damernas Värld does not feature Zara at all during 2007. There was not even one picture of a Zara garment during the whole year – the only exposure of Zara was a mention in a text. This can not be due to the lack of advertising only, as Damernas Värld feature many new and unheard-of designers. The only reasonable explanation I can think of is that Zara has failed enourmously in creating an image that is trendy and classy enough for Damernas Värld. This magazine has a strong focus on design and they may dislike the fact that the design of Zara’s garments is not original, but they still feature other budget alternatives with unoriginal design. The target group of Damernas Värld is older than those of the three other papers, and the editorial staff on Damernas Värld seem to think that it is incompatible with Zara’s image. The branding strategy of Zara must have failed here not only by not doing advertising, but also in doing the marketing actions they do.

**DIFFERENT TYPES OF EXPOSURE**

All kinds of media attention in magazines and newspapers cannot be assessed in the same way. Different costs for the media must be considered, as well as different probabilities that the reader will notice the mention of the brand. In the analysis, three different types of media exposure are recognised:

1. *Photo shoots with model.* These pictures usually cover a whole page. They are the type of exposure that is the most expensive for the papers. The featured garments get much space and attention, but the text that lists the featured brands is usually small. This kind of exposure is probably highly desired by the retailers.

2. *“What to buy”*. This is the name I have given those pages where garments that the editorial staffs like are exposed. No model is used. Compared to the photo shoot, more ar-
articles are shown each page. I expect this to be the second most desired type of exposure.

3. Others. The remaining types of exposure may or may not include a picture of a garment. In most cases they represent a simple mentioning of brand in some kind of text.

There were interestingly many similarities, between both brands and media, in the ratios of the three types of exposures.

![Figure 5. The relations between different types of exposure for every brand in each of the four media.](image)

I consider here only the cases where I have enough information for percentages to be meaningful. I estimate > 15 exposures to be a good threshold. This is motivated by the fact that the smallest of the three groups of exposures typically range from about 7%. With less than 15 exposures the expected number of this type of exposure would be less than one. With a statistical security buffer of one exposure, I demand more than 15 exposures to calculate the percentages.

Unfortunately, this means that Topshop is the only brand from Elle that I can use for comparison, and that Mango cannot be compared to Zara in any of the papers. However, Topshop in Elle is still in line with the ratios in the other magazines. Photo shoots are typically 10%-30%
of the total exposure, what-to-buy between 45% and 75% and the other types of exposure make up 7%-25%. This is true for all four brands with more than 15 exposures in Glamour and Elle (Benetton, Topshop and Zara in Glamour and Topshop in Elle).

Aftonbladet, with less advertisement than the magazines, can as expected not afford as many expensive photo shoots as the magazines. The exposure type ratios of Topshop and Zara in Aftonbladet Mode are close to the typical ratios, but with fewer photo shoots and more of the two other categories. Damernas Värld, the magazine with most advertisements, has more photo shoots than the other magazines. Benetton in Damernas Värld is particularly notable with more than 70% photo shoots, but this is only a single observation. In other words, the distribution of exposures of the various kinds does not differ notably between the advertised brands and Zara.

**ADVERTISEMENTS**

The advertisements of the four brands in the three magazines does not count as media exposure, but was noted for comparison to exposure data. It seems that the spring and the autumn are the right periods for campaigns, as all advertisements were in the period March to May or September to November. All adverts are a whole page or spread.

<table>
<thead>
<tr>
<th>Total number of advertisements in spring and autumn</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mango</strong></td>
</tr>
<tr>
<td><strong>Magazine</strong></td>
</tr>
<tr>
<td><strong>Spring</strong></td>
</tr>
<tr>
<td><strong>Autumn</strong></td>
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</tbody>
</table>

**Figure 6.** Total number of advertisements of the three advertising brands in the fashion magazines.

As can be seen in the above figure, Benetton seems to be the brand that aims for advertisements with a broad impact, as it is promoted in all three magazines. Mango is more modest with only one advert in Elle in the spring and one in the autumn. Topshop, on the other hand, seems to aim for a big impact in a focused target group, as they put up 11 advertisements in the spring and 10 in the autumn.
To see if there was any relation in time between advertisements and exposures, I looked at the distribution of exposure over time.

None of the advertised brands had exposure patterns that exactly corresponded to their periods of advertising, or that differed remarkably from the exposure pattern of Zara. Considering the periods of advertising and the small number of data, there were no conclusive evidence for a direct response in media attention to advertising.

The main results from advertising are probably seen from a bigger perspective. It has already been stated that Topshop has a very successful branding strategy, and the intense advertising is of no doubt part of it. It would be easy to blame Mango’s failure in getting media attention on the parsimonious advertising (for a marketing strategy based on advertising), but there are likely other factors involved as well.

**CONCLUSIONS**

When looking at the figures, it looks like market orientation strategy as represented by Zara (17%) is doing okay in the competition with the three other advertised brands; Benetton...
(19%), Mango (6%) and Topshop (58%). However, when looking more into details, it is obvious that Zara reaches only some target markets as represented by magazines and not all.

The two brands with the most advertising in the three investigated magazines, Topshop and Benetton, are the ones that get the most media attention in the magazines. All three advertising brands are furthermore rather constant in their share of total exposures in the magazines. This continuity is something that Zara lacks.

The answer to my research question, “can market orientation as a marketing strategy evoke the same amount of brand awareness as advertising?” is: yes, a company using market orientation as a marketing strategy can in general create the same level of brand awareness as those companies using advertisements. In some target groups represented by the magazines, however, advertisement seems to be a more effective tool to get more control over the brand and to promote the image of the brand.

My hypothesis that the four brands would get approximately the same amount of media exposure, because they are approximately equally successful and target the same group of customers, is not supported by my data.

**SUGGESTIONS FOR FURTHER RESEARCH**

This study is limited by the fact that I do not know exactly how the magazines work with the different brands. For instance, I do not know how they choose what brands to feature and
whether there are any contacts between the magazines and the featured brands. Furthermore, the scope of the study was limited to a year and to the segment of women’s fashion. Given more time, these would be the first issues for further investigation.

In addition, I cannot conclude that fashion magazine exposure is a good representation of brand awareness of the target market. Further research should look more into the relationships between fashion magazines and fashion retailers, and the connection between fashion magazine exposure and customer brand awareness. It would also be interesting to conduct interviews with the personnel of the sampled brands on how they are using advertising strategy and marketing orientation. Moreover, an interview of the fashion magazines personnel would be of great help to understand the reason behind variation in exposures of certain brands.
LIST OF REFERENCES


Eder-Ekman, K 2007, ”Lyxens globala klassresa” [Swedish], Dagens Nyheter, 28 October.


APPENDICES
Below follow graphics of all individual exposures for each brand and magazine.

Benetton

Mango