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Advertising – Then and now

"A qualitative study of Internets effect on advertisement strategies"

Abstract: With the rapid growth on Internet and the change in customers' attitude and behavior towards digital media channels today, advertisers can expand their traditional advertisement strategy towards a more digital advertisement strategy. Thanks to technological progress, new ways of building creative campaigns now exists. The aim of our thesis is to conduct an exploratory study, with the changes of advertising strategies due to the effects on the rapid Internet growth as a focus. When looking at a ten year prospective we can see that consumers are moving towards Internet. Conclusion from our study is that the use of media channels used simultaneously has increased, and this has lead to a more complex media landscape.

Key words: Advertising, Internet, Social Media, Marketing, Superbrands

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1. Introduction

"Advertisements are now so numerous that they are very negligently perused, and it is therefore become necessary to gain attention by magnificence of promises and by eloquence sometimes sublime and sometimes pathetic." (Samuel Johnson, 1759).

This was stated in an article concerning advertising in over two hundred years ago and the trend has undoubtedly been a steady increase ever since. That modern advertising would overwhelm Johnson would be a mild understatement. Never has man faced such vast information and advertising noise as today. The different types of media channels have increased numerously over the last decades, and have brought us ways to communicate not imaginable only a few years ago. The most prominent one is the introduction of the Internet, which according to many has only just begun its evolution in areas of applications.

1.1 Background

Internet usage has increased substantially over the last years, since the first mappings of Internet behaviour done by the World Internet institute (WII) the Internet penetration has evolved rapidly. In 2000, only half of the Swedish population had access to Internet in their household, a mere 45 percent claimed to use email on a regular basis and only 18 percent claimed to have tried e-commerce where only 8 percent had shopped online more than once a year (Findahl, 2000). In 2010 the situation had changed dramatically: 91 percent of the population had Internet in their household, a total of 8,5 million Swedes (SCB, 2010). Furthermore, 81 percent used the Internet on a daily basis, half of the population was a member of a social network, 81 percent stated that they use e-commerce regularly and a third of the population paid their bills online. In short, the list of activities that are now Internet based could be made longer (Findahl, 2000). This evident trend among consumers, to spend an increasing amount of their awoken time and daily activities online, has not left companies unaffected. Magazines continue to be a strong media player, but are a decreasing medium while Internet advertising has increased annually (Resume, 2011).

Thanks to technological progress the possibilities for interaction and consumer involvement in ad content now exists, and has opened up for new creative ways to build campaigns.

Due to an increase in media channels and ad-explosion primarily online, many claim that it requires smarter and more extreme measures in order to get through to the customers in this more competitive advertising environment (Sjödin and Rosengren, 2011). Examples of this are plentiful, like Tipex's reversible ending commercial on YouTube, the "save-your-favourite-flavour-campaigns" by brands like Marabou and OLW, and the increased presence of companies in Social Media like Facebook, Twitter, blogs and in mobile applications (Almer and Djerf, 2010).

Internet has clearly changed the way we live and conduct business, but exactly to what extent has this new medium affected how companies advertise themselves?
The birth of Social Media and the free round of the Internet engage a more active consumer, and invite a new form of relationship between company and consumer. Few has been able to answer if this is something that companies understand how to explore, if this is something they are actively perusing and whether it results in any ROI. The trend doesn't seem crystal clear, not all seem convinced or ready for the transit to bring their company to the Social Media round. A recent article in media newspaper "*Dagens media*" showed that five of the twenty largest media purchasers in Sweden are totally absent from Social Media, and very few are investing any lager sums in these medias, referring to them as "not a part of their current media mix" (Almer and Djerf, 2010). The study, however, displayed an interest and general positive attitude towards Social Medias in the future, but a reliance on traditional media is dominating actual media purchases (IRM, 2010).

By studying how companies are actively working differently with their advertising strategies today, than they did 10 years ago, we will try to determine if and how the Internet, with its impact on consumer behavior and media channel development, has changed the companies' work with advertising. This will be done by looking at changes in the operative part of advertising strategy, namely: setting the budget, choosing media and developing a message. Advertising through Social Media will be given extra attention and be incorporated in all of the above areas.

We will try to answer questions such as: to what degree has penetration of Internet affected the way advertising is performed by companies? Are online advertising activities given the centre of attention, or are companies still focused on traditional measurers?

1.2 Purpose and research question

In this thesis we aim to explain in what way Internet has affected companies in their choice of advertisement strategy. By examining the current climate in marketing departments from selected companies, we will investigate what impact the overall increase in usage and usage areas for Internet has had on advertising activities. Investments in Social Media Networks for advertising purpose are given extra attention because of its recent and unexplored entrance on the market as a company advertising tool, and the need for further mapping.

Thus the purpose of this thesis is to establish if there are any clear changes in advertising strategies in today's business world, and if so, what are these changes and how do they affect companies advertising methods. The thesis questions are therefore stated as follows:

"In light of the rapid increase in Internet usage during the past ten years in Sweden, how has the advertising strategy of companies active on the Swedish market changed, in terms of budget decisions, message decisions and media decisions? And to what extent is Social Media used in advertising among companies on the Swedish arena?"

1.3 Delimitations

Due to the scope of this thesis and the restricted time frame, we have chosen to limit the research to only include Swedish marketing activities. This means that only Swedish marketing departments will be represented and the conclusion will only be applicable to a domestic market. Within the theoretical subject of advertising strategy we will delimit the areas of investigation to focus only on the operational act of advertising. In effect, we will neither be looking into the work of defining objectives and identifying targets, nor the post-work of evaluating the campaign, with respect to that these areas are not of interest for actual marketing actions. They vary with the central content of operational parts and are not of main interest for this thesis. We are investigating changes in advertising from a consumer point of view, and will therefore only look at companies active in the business to consumer category. We have chosen to look at ten different companies in this study. The number of subjects was set in order to provide enough insights and a broad knowledge, but at the same time limited by the amount of time and space provided in this thesis for gathering and analyzing the data.

1.4 Expected Contribution

We hope to shed light on how companies perceive advertising and to understand the drivers for media purchase. This technical development has been going on in the open, attracting a lot of attention. We would like to bring further insight in how companies perceive marketing actions online and in Social Media, and if they appreciate this opportunity or put their trust in classical media and proven methods. We would also like to contribute to the many companies who are dealing with strategic decisions of this calibre. By providing a framework and conceptualize actual activities on the area made by companies, the knowledge will increase and bring new insights to the whole market. Since this is a fairly new and unexplored territory, this mapping and presentation of actual advertising actions will hopefully provide new information and deeper knowledge on the evolvement of web-based advertising.

1.5 Disposition

After this introduction and background, the reader will be given a presentation of the current conditions and market situation of advertising in chapter two. This passage will also provide earlier research on the area, and inform the reader of the preconditions in this study. This will be followed by the method in chapter three, which will explain the method and choice of study used to perform the exploratory research. This part also includes a review how we have collected the thesis data, both secondary and primary.

The theory that provide the base in this thesis will be presented in chapter four, followed by a presentation of our exploratory interview findings in chapter five "Emperical findings". This will be followed by a passage where the findings are analyzed and summarized and lifted in a discussion part. To give further depth to the thesis, there is an ending problematization part where the method and results are reviewed and criticized on points where some amount of caution in conclusions are found necessary, and where there is need for further research.

2. Market situation & Literature review

In the following section a presentation of the technological developments on the advertising arena, mentioned in the introduction, will be disclosed further. A presentation over some of the earlier research done on the area will also be provided. The information will give an insight in the pre-stated conditions that the actors of the study are acting according to. These conditions will provide the base for the analysis, were the empirical interview findings will be put in context with current situation, and insights on the evolvement in advertising strategy will be linked to the market situation.

2.1 Marketing and Internet

Marketing is commonly known as the process of satisfying customer needs throughout a products life cycle while being a two-way leveled communication (Kotler et al. 1996). This definition inclines a social relationship between customer and company providing value after their wishes. In such a context Internet is an optimal tool to connect with customers. The notion of web 2.0, an umbrella term for interactive web services and business models where users have great potential for interactivity and collaboration, is a foundation for this. Internets evolvement, from being used for information retrieval towards interaction, has resulted in that a lot of marketing communication is different than in the past (Campbell et al. 2011). This new level of interaction and participation online between customers and companies has increased the transparency raised the demands on companies to respond and explain themselves in a much higher degree and has amplified expectations of openness (Qualman, 2009). Internet as a two-way medium has also lowered the barriers and enabled in a whole new way channels for mass communication. It has allowed consumers as receivers of messages to respond and express themselves, giving them more power and opportunity for advocacy. This increasing empowerment of consumers is one of Internet's key characteristics. It comes from the increasing information base, which provides users with greater choice and more control(Füller et al. 2009). The design of Internet advertising undoubtedly sets it apart from other media when it comes to managing and terminology. New products, pricing models and formats have been developed specially customized for Internets unique nature (Gretzel et al. 2000). The Concepts of banner display, behaviour targeting and Search engine optimization are included in the term web marketing in this thesis and defined below:

Banner display advertising

Often when one speaks of Internet advertising they refer to display advertising and banners. Banners are promotional images incorporated in a web page for display with page content. Banner ads can now include not only graphics and texts, but also audio, video and dynamic and interactive banner ads, giving way for more creative campaign solutions (Shen, 2002). All advertising objective and concept is the same, all are assessed on rating points of how many have the opportunity to be exposed to the advertising message (Krishnamurthy, 2000). Banner display is measured by the number of times the ad is loaded on a users screen. The price model for this type of advertising is either CPM (Cost Per Mill) where you pay a set price for every thousand impression, or CPA (Cost Per Action) were you pay for every time the banner has been interactive with, weather it is per click, per new registered member or completed purchase through linkage via banner (Hoffman and Novak, 2000). In this concept advertising on Internet pages adapted to a mobile format is also included.

Behavioural targeting

Is the usage of a visitor's online history to target consumers by collecting information about previous Internet behaviour. This could be used in combination with geographical and demographical factors to target customers with more relevant advertisement. Behavioural targeting allows for buyers to select to who their online ads should appear.

Search engine optimization

Search engine is more prominent today than ever in the online world and growing as an advertising tool, more than half of all visitors to web sites now arrive there from a search engine rather than through a direct link (Dou et al. 2010). Two types of advertising activities can be conducted through search engines; you can purchase links on the web site displayed in the "sponsored section" of the search engine, the results will appear on the side of the "Organic search", or you can use word optimizations were companies strive to push ranking of their web sites higher among the organic search results (Delaney, 2006).

Consumers spend an increasing amount of their time online, even if there still are big differences between different age groups and their time spent. In the age group 16 – 35 a daily Internet usage is dominant. Using the Internet more occasionally is more common in the younger and eldest groups of the population, Internet over all usage is how ever increasing in

all age groups (appendix 3 chart 1.1) Time spent online is also increasing, none the least due to new technical development in mobile broadband. Swedish men spend an average of 12,5 hours online every week and women 10,2 hours per week (appendix 3 chart 1.2). Internet is one of the primary sources for information search in Sweden, were 7 out of 10 persons claim to use Google search engine for information search (Findahl, 2010).

Media consumption online is another area that is steady increasing. This however has not reflected in a corresponding decrease in other types of media. Reading the paper has remained at a fairly constant level, as has TV viewing. One of several explanations is that simultaneously media consumption is gaining in popularity. Watching TV has become an activity that is often combined with using the Internet. Half of all Internet users occasionally watch TV and use Internet simultaneously, and up to 32 percent of the Swedish population do so on a daily basis (Findahl in Cardoso et al. 2010).

2.2 Advertising today

Advertising online in Sweden amounted to 5 billion SEK during 2009, and it has increased steadily during the past ten years which is also the case of total media spending in the country (BCG report, 2010). In 2010 online ads passed TV with a total share of 9,3 percent of Sweden's total media investments, TV had at the time a share of 8,4 percent. This development was in some respect a result of the cutbacks during the recession in 2008, when the more expensive TV productions were replaced by less costly Internet solutions. Media spending in Sweden in total has increased during the last decade, and the media landscape has undergone a change with decreasing investments in print and increased investments in Internet (see appendix 3, chart 1.5).

At the same time research shows that consumers in traditional media have a more tolerable attitude towards advertiser's presence. There is a silent agreement that in exchange for advertising, consumers receive reduced-cost programming and editorial content that leads to a higher acceptance (Gordon and Lima-Turner, 1997). The rapid evolvement of the free web has however lowered this tolerance and advertisement online is not accepted to the same extent. Advertising is instead considered by many to be intrusive and annoying diversions that disturb the flow of consumer's online surfing (Matthews, 2000 and Gaffney, 2001).

2.3 Advertising and Social Media

The usage of social communities has exploded during the ten past years. With the introduction of new social community sites the increase has been consistent throughout all ages. Online meeting places has in a natural way interested more and more people in increasingly higher ages. The sociable human being finds this an easy and accessible way to keep in touch with friends and family. Today the majority of Swedish Internet users up to age 45 years of age are members of a social network, primarily Facebook (see appendix 3, chart 1.4). In 2010, 31 percent of the population stated to be a member of an online community and 46 percent visited social networks (Findahl, 2010).

In the wake of this technological progress, and increasing usage of social networks, a trail of scientists, experts, bloggers and consultants on the subject has emerged. Social platforms and new media has never been more interesting to so many, only the word "Social Media" has a staggering 219 million hits on Google's own search engine. In a recently published article from Swedish media newspaper "Dagens media" (issue 21; dec 2010), an expose over the 20 largest media purchasers in Sweden and their activity in Social Media was published. It revealed that all of the companies are placing miles more in traditional media than in social media, despite the increased consumer base active there. Social media expert Jerry Silfwer, Pr consultant on bureau *Wispr* in New York, states; "You can tell that many companies are struggling internally over how to organize themselves internally. They have to except that social and digital media needs to find a home, someone to own them." The common strategy for most companies was to appoint a specific person in charge of Social Media. Not all companies were however neither active in Social Media, nor had any incentive to do so. Out of the 20 companies a total of five companies did not put any efforts in Social Media and had no thoughts of doing so.

2.3.1 Social Media landscape

The increasing interest and growing focus on social media as an advertising forum has increased in popularity up to the point, that official guidelines and standardize definitions has been made. The IRM, International Advertising Bureau, consists of more than 500 of Americas leading media and technology companies, responsible for selling 86 % of online advertising in the United States (IAB, 2011). They have also appointed a special "social media committee" dedicated to help develop and expand the social media space as a viable advertising platform by conducting such guidelines and praxis (IAB, 2011).

The most profound value of Social Media is according to them the added participatory element were an individual has the ability to take part, create and distribute own content instead of only receiving. Furthermore it enables a dialogue and discovery around the content. The current Social Media landscape can be broken into three distinct categories: Social Media sites, Blogs and Widgets & Social Media Applications, deified by industry organisation IAB. Below follows a definition of each media and a specification of its value as an advertising media and its metrics.

Social media site metrics

Social media sites are characterized by a social inherent functionality that facilitates the sharing of information between users within a defined network. It allows for conversation by either party, a key differentiator from established broadcast channels. The evaluation of a network is primarily based on the number of active participants, for consumers this is measured by the frequency of engagement of the participants. For marketers this is judged mainly on amount of friends/followers/subscribers, a number to validate their effort and activities and viral distribution of their brand. Under this category we will define platforms such as Facebook, YouTube and Twitter.

Blog metrics

Blog is short for weblog, and is defined by the IAB as a Web site used by individuals, groups or business entities to publish opinions and commentary on various topics that could be varying from niche topics to a personal diary form. Posts could be in the form of text, image or video and allows direct impact and response from followers. For advertisers, blogs offer an interactive channel to reach engaged and enthusiastic consumers. Additionally, because of their conversational nature, blogs can provide companies with detailed insights about consumer behaviour and intent. The topic of the blog is a good indicator of consumer behaviour and interests, it allows advertisers to target theirs efforts on chosen segments. Following attitudes and opinions of target customers gives further value in form of a new insight on a personal level, instead of forming a communication on statistical reach and audience metrics.

2.3.2 Word of mouth marketing (WOM)

Word of mouth is a pre-existing marketing term that means to get customers to talk and spread news about a company's brand, product or service. It is the art of building active, mutually beneficial consumer-to-consumer and consumer-to-marketer communications (Wom 101, 2007). Word of mouth has become a central concept in Social Media marketing and has provided a new tool for positive viral spread (Bughin et al. 2010). Some of the forms of word-of-mouth marketing that are conduced online are:

Buzz Marketing: through high-profile entertainment or news to get people talking about your brand.

Viral Marketing: Creating entertaining or informative messages to be passed on in an exponential manner.

Community marketing: Forming niche communities such as user groups, fan clubs and discussion forums that are likely to share an interest about the brand.

Product Seeding: Placing the right product into the right hands at the right time,

Influencer marketing: target influential persons and opinion leaders to talk well about the product in order to affect others.

3. Method

To answer the thesis question of how advertising strategy is different today from ten years ago, and to what extent Social Media is used in advertising; we have adopted method of investigation. The thesis method and our research design will be presented in this chapter.

3.1 Research design

In this thesis we acknowledge the changes in consumer behaviour due to technical progress. We also identify the increasing media efforts in Social Media. In order to get a diversified view into the actual investments made in these, we have adopted a qualitative research method. Such a method is suitable for exploratory research, when the objective of the study is to detect sublime facts and deeper knowledge (Jacobsen, 2002).

This technique will give us a more diversified picture of the problem and a better chance for analyzing the facts. The collection of insights will be made from depth interviews with key persons within the organisations in the study. This method will provide a more detailed and

complex picture of the situation at hand. In-depth interviews are in relation to case study a better way to provide an overall and more general picture of the situation at hand. With several different inputs from varying business areas, we will be provided with less precise information but instead given a broader knowledge base (Holme, 1997).

The interview questions are divided into areas concerning developments in message, media and budget. By dividing them into structured blocks, comparability and measurability between the companies and business areas will be easier. A clearer pattern for the readers and the analysis will be obtained. In addition to questions concerning these three areas will be a question block concerning attitudes toward Social Media in advertisement (se appendix 3.) This part serves as a tool to give more insights on this particular media and its overall effect on all the blocks. Social Media defined as: Social networks, blogs and widgets and Social Media applications (as defined in section 4.3). In the term Social Media the following platforms are included: Facebook, YouTube, blogs, Twitter. All questions follow a semi-open interview technique to encourage to a dialogue and further discussion on the area concerned, all to give a broader and deeper insight.

3.2 Choice of Theory

To organize the findings from our qualitative investigation, we have a starting point in classical marketing theory of advertising with a foundation in well renowned publications within the area. Using a structured model for advertising strategy, we will categorize the areas into clearer variables of explanation. The model is originated from David Jobber's *Principles and practice of marketing,* and assists marketers in the strategic work of advertisement planning. To limit the area we will use only a part of the complete model, which concern the actual act of advertising, i.e. setting the budget, choosing message and media channel. This will mean excluding the theory of pre-planning segmentation and post-work of evaluating effectiveness. We have chosen to use classical marketing theory in the strategic work of advertising, since this thesis concerns the changes in the operational work of advertising. The model that is used concerns the overall components that are important to map in such a study. This model therefor provides a good framework to present the larger picture.

3.3 Data collection

The collection of data has been attained both through secondary sources and by gathering primary data. This has been conducted by various techniques coherent with an exploratory research design to get a wide range of relevant facts.

3.3.1 Secondary data

Earlier research and a presentation of current market situation have been gathered from legitimate sources, with the intention to give a diversified exposition of today's market as well as provide deeper knowledge to the reader of the area of investigation. Primarily information has been gathered from academic work in renowned databases like the *Journal of advertising research.* Later material from updated articles and credible journalism has also been included to give a fair representation of the trends and current attitudes on the market. Credible sources include institutes, business statistical bureaus and publications from renowned journalistic sources like the Wall Street Journal. Markets and attitude surveys from professional actors is also used for finding secondary data about consumer insights.

3.3.2 Primary data

The collection of primary data has been made through in depth interviews with ten subjects. To motivate our choice of investigation, we refer to classical marketing theory that connects the act of successful advertising and effective brand building. When choosing subjects of investigation, the starting point is to look into companies that are prominent in the act of advertising. To look at market leaders on the subject will add further value to the thesis as an insight of how renowned companies actually do in these matters. This will in turn add relevance to further research. A measurement of a company's success in their advertising actions is their brand equity. A company who has successfully built a strong and prominent brand name, has done so by well calibrated advertising efforts to set the right image in the minds of consumers. To get a relevant survey group, we have chosen to interview the most prominent companies in branding in Sweden, as chosen by the respected brand trade association Superbrands.

3.3.3 Brand Council - Superbrands

To measure and evaluate the companies' brand success rate, we have used research data from the international and independent organization Superbrands. They have been active in Sweden since 2004 with a purpose to spread the knowledge of prominent brands and their importance on the market, and to reward Sweden's highest ranked brands (Superbrands, 2011). Superbrands have separated the valuation of an organization's brand value into two different groups. They treat business to business companies (B2B) and business to consumer companies (B2C) different due to the nature of the relationship and the different marketing techniques required. In this thesis we are interested in advertising from a consumer point of view and will therefore only look at top brands in the B2C category. Superbrands lists the top

100 B2C brands in Sweden in descending order, the top 20 and our primary interview subjects are stated below (Superbrands, 2010).

1. Google
2. IKEA
3. Orrefors
4. Apoteket
5. Marabou
6. Fjällräven
7. Blocket
8. Hitta.se
9. Ferrari
10. LEGO
11. ICA
12. Kexchoklad
13. Liseberg
14. Bang Olufsen
15. SVT
16. Audi
17. Wasabröd
18. Nokia
19. Alvedon
20. Systembolaget

When assessing a brands success rate, Superbrands has adopted a methodical way of conduct to select the top brand. Their research is divided into several steps, were they narrow down an initial large number of well-known brands to the final hundred. Both quantities and qualitative techniques are included in the process, which is preformed in cooperation with TNS SIFO Research International (see appendix 4).

The Brand Council is composed of individuals with extensive experience of brand management and is elected on an annual basis. Every Brand Council member represents industry in the Swedish market in order for the study to be as optimal as possible.

3.3.4 Interview selection

The empirical findings in this thesis are based on in-depth interviews with central marketing personnel on 10 different companies elected Sweden's top 20-brands by organization Superbrands. To gather this data, we contacted 10 of the top 20 companies and conducted 30 minute to one hour in-depth interviews over phone or in person. Those who participated are diverse in business area, size and funding. The common denominator is their success in building exceptional brand image on the Swedish market. The participating are Swedish and global companies with headquarters in different regions of the country, interviews were however only with market side of Swedish departments and disclosed actions solemnly on the Swedish arena.

The final selection of interview objects was based on several factors. Consideration was taken with regard to the character of business expertise and area. We were limited in our selection of how accessible the companies were and what information policy that surrounded them. The ultimate selection of equally interesting companies, all of them named top twenty Swedish brand, was a result of a conscious blend of wanting diverse business areas and cooperation from their side. Central marketing representatives from the following companies are included in this thesis, stated without internal ranking; Google, Blocket.se, Hitta.se, Orrefors, Audi, Kexchoklad, LEGO, Systembolaget, Liseberg, Fjällräven (see appendix 1 for company presentation).

3.4 Quality of research

To attain the purpose of the research process it has been important to evaluate reliability, validity and generalization to determine the quality of the research (Yin, 2009).

Reliability has constantly been in mind during the research process. Reliability is known as to what extent a study can be measured several times and results in the exact same findings as the original study (Bryman and Bell, 2010). We have used an open-ended interview format for our study. There is always a risk with this type of format since it is easy to miss relevant information and this is often to be found some time after the actual interview session (Trost, 1993). There is also a risk that the interviewees will be affected by their mood or where the interview is held. To reduce these risks and strengthen the reliability of our study, both interviewers attended every interview except one. One person asked the questions while the other took notes. The person who was asking questions switched between different interviews to avoid opinion biased personal attitude. If anything was unclear, the interviewers asked the interviewees to specify. If possible the interviews were recorded for further reliability, and the interviewees were allowed to comment and add information after the interview was conducted, all to secure a high reliability of the study. We also used several kinds of secondary sources (academic research, reports, newspapers, journals, online sources), and to obtain reliability all sources were gathered from the origin source.

To secure the validity of the research, it is important that the researcher ensures that he or she really measures what is intended to be measured (Kvale, 2002). One way to increase validity is to use multiple sources of data collection (Yin, 2009). To secure this we have used a collection of both secondary and primary sources, and ensured that these two were coherent and the findings was significant.

The internal validity is to explain the accuracy of the results when describing reality (Merriam 1994). The external validity is a measure to what extent the study can be generalized or not (Yin, 1994). Some argues that qualitative studies have lower external validity due to the fact that there is often small data samples used (Bryman, 2006). This might pose as an argument against the possibilities to draw any general conclusions in this study, we will therefore remain careful when making statements and generalizing the picture of advertisement today. Since our study only represent a small sample of all companies on the Swedish arena, a conclusion about the Swedish market as a whole will be difficult to draw, and will not be the aim of this thesis. Our aim is to enlighten and inspire for further discussion and research. We are aware of the fact that the interviewees are not only representatives of their company, but also individuals with own agendas and opinions. We have designed the questions to address the company's views and fundamental values, but reserve for the fact that some of the individuals own opinions and attitudes will shine through in the responses. We have therefore tried to keep these interviews with key management people in the organizations to assure an official standpoint. The question blocks were arranged to allow a more open and descriptive approach. Questions regarding the media channels were held first, to provide a knowledge base for further questioning concerning more detailed information about budget and message changes. This resulted in that questions regarding media opened the interview, followed by budget and then message. This gave a better flow in the interviews and higher quality in the conversation, and provided a more comfortable and relaxed interview situation.

4 Theory

The theory presented in this passage will act as a framework for further analysis and conclusions. The theory is based on classical marketing theory on the subjects advertising and branding, and will bring structure to the theoretical contributions of this thesis.

4.1 Advertising Theory

The definition of advertising has been stated by many, but in essence it is captured by the following phrase "Any paid form of non-personal presentation and promotion of ideas, goods, or services by an identified sponsor" (Kotler and Armstrong, 2000). By that definition, advertising is a conscious act of sending out a message to the public. The communication strives to attain a pre-destined reaction, and is in many ways the conceptualization of a company's marketing efforts. In the act of advertising, a company's objectives and strategic choices are brought to life in a well calibrated campaign.

4.2 Advertising and brand building

Advertising is a key component in marketing. It is the link between companies and the external actors, a channel on which the outside world can assess your performances on. Advertising is also one of the major components in brand building and gaining brand equity (Aaker and Biel 1993). As stated by Prentice and (cited in Ryan 1991, p.19) "The consumer's perception of brand value comes from many sources, but essentially it is based on ideas, rational or emotional, that set the brand apart from competitive brands. What kinds of marketing activities implant these ideas about a brand's uniqueness in the mind?.... Advertising is the most common."

The linkage between a strong brand, and an effective advertising communication, motivates the choice of examining companies that have managed to build strong brands. Companies who are prominent in brand building are also experts on effective advertising strategy, which makes them ideal subjects for this thesis.

4.3 Advertising strategy model

When developing an advertising strategy there are several steps to take into consideration. Advertising is a part of a company's marketing mix, and must be in line with all marketing efforts in the organization. An advertising strategy model describes the steps that one should follow when developing an advertising plan (Jobber, 2007).

The initial steps are based on the overall marketing strategy, and it is vital that the message communicated through advertising is in line with a company's objectives and core values as set by pre-stated marketing guidelines. When deciding strategy, it is important to understand your target audience and to define the advertising objectives with the campaign. These steps are included in the planning parts of an advertising strategy.
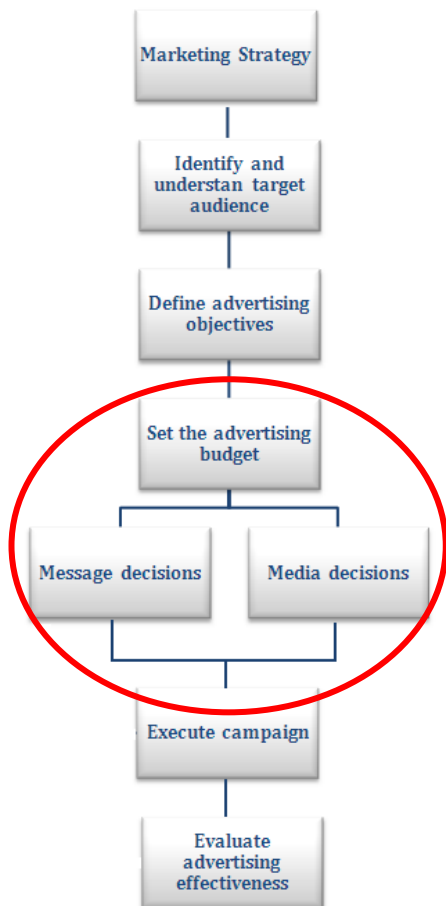
The actual operational parts of a strategy are the center parts of the advertising strategy model. This includes setting the budget for the campaign, deciding on which medias should be used and what message is to be sent out. These decisions vary from campaign to campaign and are calibrated in respect to the target audience and consumer behavior (Jobber, 2007). The later parts of the model concern the execution and hence result of previous decisions and the evaluation of the campaigns effectiveness. Since in this thesis we will investigate actual changes in advertising strategy due to evolving consumer behavior, we will assume that companies over all objectives and orientations will not be affected by this specific evolvement in technology, these parts will be assumed to be unaffected. The interesting parts of the strategic work will be found in the operational decisions, and will therefore be the subject of investigation.

Model 1.1 developing an advertising strategy (Jobber 2007)

The advertising strategy model will act as a framework to determine in what areas the strategy has changed. The red-circled boxes represent the three focusing areas that will be examined and mapped.

4.3.1 Setting the Budget

Budgeting is the initial step, where allocation of resources is set with respect to objectives and strategic decisions. When basing the advertising budget on communication objectives, the cost of developing the necessary campaign and using appropriate media will be calculated. Facts concerning reach, target group, current price of channels and long-term effects are taken into consideration (Jobber, 2007).

We have chosen to look at budgeting on a long run perspective. Of course the budget for each advertising campaign will vary with respect to segmentation and goals. These types of detailed information of the companies focused marketing efforts in each campaign are not of relevance for comparison in this particular study. The framework for questions regarding budgeting will be on a year basis, and focuses on appraising the major changes in annual budgeting on a ten year period. This definition will result in softer facts, and show trends more than hard numbers; it aims to give insight in over all changes.

4.3.2 Deciding Media

Media is the channel to which the ads will be communicated through. Each media possesses its own set of creative qualities, limitations and needs to be weighted to the objective with the campaign (Jobber, 2007).

In this thesis we have defined media as the cannel used for all marketing communication. Media includes all form of conscious brand presence in order to promote or build awareness. This includes event and sponsored activities with branding elements, such as fairs, sport events or charities. Media channels also include in-store efforts, public relationship management (PR), editorial attention and product placement. One company also used destination advertising, defined as cooperation between company and city council to increase tourism and local visits. Apart from this the "traditional" bough channels such as TV, radio, magazines, press and outdoor display are represented. Some companies have launched mobile applications in a service and promotional purpose, these are also considered as a form of media of advertisement in a brand building sense.

When referring to web presence, this inclines advertising efforts on own webpage as well as advertising on external pages, so called online banner display. Further advertising media on the web are search-engine-optimization, companies can buy high rankings on specific words run by customers in search engines online. The biggest one on the market is Google's product *Adwords*. The special form media, described as Social Media, will be given additional attention and therefor is not included in the term web. These channels are defined as interactive platforms online, and include the following; Facebook, YouTube, blogs and Twitter (see appendix 5, glossary). Other platforms may go under the notion "Social Media", but are not included due to lack of interest for this study in reference to being absent from all included company's media mix.

4.3.3 Deciding Message

The message of an advertising strategy is defined as the objective of what is meant with the communication. Understanding the motives and choice criteria of the target audience is essential for effective advertising. An advertising message translates the objectives into words, symbols and illustrations that are attractive and meaningful to its target audience (Jobber, 2007). The message concerns a company's public communication strategy. This includes what message they want to communicate and in what forums they communicate what (Nan and Faber, 2004).

An advertisement message varies with product and purpose of the communication; it is developed individually from campaign to campaign and is highly personal with every new launch. When we refer to message changes in this study, we have done so in a general perspective i.e. changes will be observed in general tactics concerning over all advertising message and message strategies. The change in message will depend primarily on in what way the media landscape has affected the message delivered. The message itself is therefore not of main interest, but the collective thought behind it and the external factors it is based on. The questions regarding changes in message in this thesis will therefore concern external factors and their implication on how the message is carried out, and in which aspects the companies think differently when developing a communication campaign today from before.

5. Empirical findings

In this chapter we will present the findings from our in-depth interviews conducted with marketing departments, concerning changes in their operational work in advertising strategy.

In an initial step the information provided in all ten interviews was put together, and the key points of interest were screened out and given extra attention. These key points summarize many of the important points in each operational area. They were then identified and singled out as a second step.

The disposition of this chapter will follow the central model for advertising strategy. Each section will disclose one of the three operational part of advertising strategy, in order of appearance: Media Decisions, Budget Decisions and Message Decisions. Each section will be ended by a short summarization of the major factors and key findings for a clearer overview when moving further to analysis. The findings are categorized into the blocks of investigation,

and further divided into sub-groups for a better comparison between each interview subject. They are presented by the conceptual model below:

Model 1.2 – Conceptual model over changes in advertisement strategy
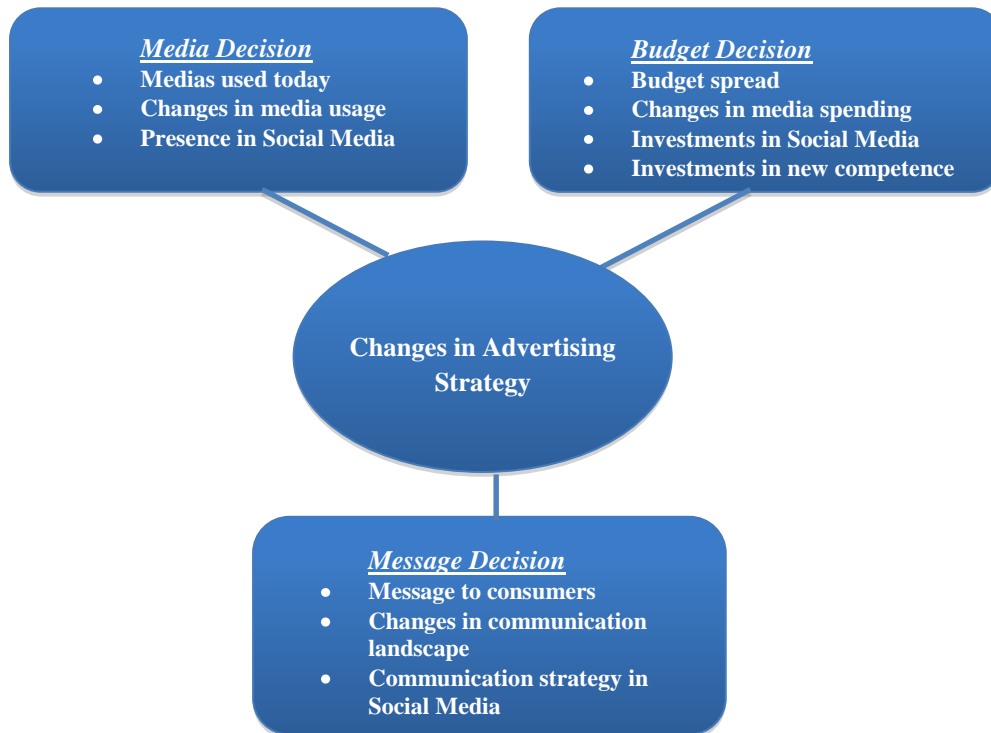
The individual responses from each interview subject (company) are presented in the chart below. The cells are divided accordingly to the conceptual model. Each answer is presented in short with reservation for terminology and information defined in earlier sections.

	Media decisions			Budget Decisions				Message decisions		
	Medias used today	Changes in media usage	Presence in social media	Budget spread	Changes in Media spending	Investments in social media	Investments in new competence	Message to consumers	Changes in communication landscape	Communication strategy in social media
Audi	Print, Web, TV, Event, Sponsoring, Direct mail, Mobile application	Used a lot more direct mailing, now mainly through webpage and Internet	Facebook	Confidential	Same spending as before, have kept adding channels not substituted	small, attended conferences, but most information by rumours, being attentive	Have added a position for online marketing coordination	Attractive, sophisticated and technically perfect, communicate benefits with product	Reach the same customers in more effective way, easier today with a stronger brand	Interaction with customers but avoids technical questions, provides first hand knowledge on product development
Blocket	Print, Web, PR, TV, Radio	Print has decreased, less TV; ceased sponsoring TV shows , web has increased	Facebook, YouTube, Twitter (transferred info from Facebook)	40% TV, 40% Web, 10% PR, 10 % Printed goods	Much larger investments in TV	Low, took time to develop clear strategy and guidelines before launch	Use In-house competence, been to some lectures, input from bureau	A company for everyone, core values as simplicity, effectiveness and reliability	A more fragmented market; consistency more important today, to be memorable	Brand building and communicative, not in an advertising purpose
Fjällräven	Print, Catalogue, Event, Web, In-store communication	Efforts on web has increased and printed ads decreased	Most active on Facebook, semi active Twitter and Blog	50 % Catalogue, 20% Web, 20% Event, 10% Print	Biggest effort in catalogue, same as 10 years ago	low monetary investments, practically a free medium	Less use of agencies, hired more in-house competence, web, event, production artist	Key areas are; functionality, care of nature and wildlife, increase interest for outdoor life	More focus on events and activities, gain interest for the brand	Gain ambassadors, engage in dialogue with customers, build relationship
Google	Web, PR, Print, E-mail, Mobile application	Social Media increased, today the largest media	Blog, Twitter, Facebook, YouTube	75% Search optimization, 15% Web, 15% Print	Much more search- rapid growth, more online banner/display, less print	None, have In-house competence, ex a Creative theme in New York	Use in-house competence mostly. Young company culture- see no need of external education	Always use search, make search easier, faster, informative	More fragmented market; Important to be creative, smart, active and relevant. Increased focus on ROI over creativity	Press releases and information on blog, Two way communication on Twitter and Facebook, YouTube as an information and education strategy tool
Hitta.se	TV, Print, Web, Radio, Direct mail, Mobile	Reached same people with sponsorship as today with a more effective media mix	none	50 %, TV 20 % Radio, 10 % Print, 20 % Web	Moved away from sponsoring to more targeted media efforts	Low, some for maintenance for Twitter and YouTube, investments in-house	Investments in mobile, all planning in-house competence in execution from hired bureau	Simplicity, companies/people/places, modern, common	Use more channels simultaneously, due to more fragmented media picture, made them more cost effective	Reserved, waits for clear goal with investment

Liseberg	Print, TV, Radio, Web, PR, Event, Outdoor advertising, Destination advertising, Mobile application	Digital media has increased, more Web, shifting from analogue to digital	Facebook, Twitter, Blog, YouTube	30% TV, 30% Print, 20% Destination advertising, 20% PR Outdoor advertising and printed goods	Less in print and no more investments in radio, TV and PR has increased	In-house driven, attending seminars, try new solutions	Investments in workforce and working hours, in-house competence, media bureau as a strategic tool	Humorous, joyful and touching, feeling of "this is how it always should feel"	More fragmented media picture, try to use simple, clear, imaginative communication, maintain brand image	News of entertainment on Facebook, social media as a two-way communication tool, needs to be active and respond
Kexchoklad	Outdoor advertising, Print, In-store display, Event	Had very high presence in TV and magazines, plans to transfer this presence to web	none, yet	Almost 100% outdoor advertisement, some event and in-store efforts	TV and sponsorship stood for the majority of budget	none, yet	More focus on building an in-house competence, bureau for PR	The friendly, slightly more healthy, sportier choice	Harder to reach customers, increased professionalism in every element of a campaign	Target bloggers ex. with samples, effective use of "free promotion"
LEGO	TV, Print, Web, Mobile application	TV Increased most, some in online and digital solutions, use of blogs	Facebook, YouTube	80% TV, 10 % Print, 10% Web and Search optimization	Still majority in TV, Internet investments increasing but modest	few investment, effective use of low cost online solutions	Recruited and invested in-house competence	Playfulness, Storytelling, Interesting	Target group children; higher presence online, expectations of interactive solutions	Target influential parent bloggers with new products, use of events to create viral PR
Orrefors	Web, Print, PR, Event, Product placement, In-store communication	Social media and Internet is increasing part of message cannels	Facebook, Twitter	50% Web, 50% Print	Huge cut backs on printed media, more efforts online	invested in bureaus, increase knowledge with education and attending seminars	Hired 50% web-admin for improvements on webpage and communication online	Swedish heritage, balance between past and present, every day luxury	Competition has increased sharply, at the same time easier to reach more consumers, for same money-reach more, create attention	Reserved, don't rush into the new too fast, when not knowing outcome, easy to get bad publicity, use Facebook as a product information tool
Systembolaget	Print, TV, Web, Cinema, In-store communication, Mobile application	Used only radio and TV, Internet efforts was nonexistent 10 years ago	Facebook	5% Bio, 25% Web, 50% TV, 15% Print	All efforts in print and some in radio, bought no other space, print is how ever still the biggest post	Facebook management as a part of a total bought campaign. No specific investments	More management in marketing department, outsourced production on bureau	Communicate service without increasing sales, Be human and friendly not government	Work with several channels, message that engage and moves target group	On Facebook; customer service deals with questions, web admin posts news for information and dialogue

5.1 Media decision

Media used today

Almost all of the respondents used one or more of the "classical media", and all of them used printed media like magazines and newspaper for advertising. All companies, except for one, use web today. All companies have an official home page, but this was used with varying degree among the companies. All respondents, who did not have an advanced home page that was used in branding and information purpose, had intentions than in a short future invests further in developing this. The most used medias, after print and web, was TV, mobile, events, PR and in-store communication. Three respondents each used the less common mediums: radio and direct mail. Medias used by only one company was; Catalogue, Sponsoring Destination, out-door, Cinema and Product placement.

Changes in media usage

There was a clear trend among the respondents to substitute "classical medias" like print and TV for web channels. There were also those who claimed not to subsidize mediums in any larger extent, but just adding new ones. All of the increased media were web channels like homepage utilities, banner advertisement and efforts in social media networks and blogs. The medias that had decreased in usage was direct mailing, print, TV, sponsoring and radio.

A majority claimed that they use more media channels simultaneously now than they did ten years ago. A common perception was, that this was due to the development in technology and additional web media that did not exist ten years ago.

Each and every one of the respondents expressed the opinion that a simultaneous use of media channels is more prominent today. The number of media was stated to have increased without a corresponding decrease in other media. This resulted in that the total number of media used in many cases had increased.

It was also a general view among the respondent that this was a continuous trend. One interviewee expressed the development as: "In the future, the challenge will rather be in choosing and discarding media, than adding".

Presence in Social Media

Eight out of ten companies have an active Facebook page in their brand name. One company expressed the intentions to enter in a near future and was in a planning stage. The other company had no current objective to enter Social Media due to the nature of the product. Four of the companies have an official YouTube channel and five of the respondents have a Twitter account, all the companies who use a Twitter or YouTube also are active on Facebook. Facebook, YouTube and Twitter were the only social network sites that any of the respondents used as a media channel. There was a general trend to be less active on Twitter than on other Social networks like Facebook. One company used the Twitter solemnly as a mirroring of their Facebook posts.

To Conclude: The use of web media channels in advertising has increased, other media such as direct mailing, print, TV, sponsoring and radio has decreased. The usage of several media channels simultaneously has also increased due to developments in technology and the fact that adding media not existed ten years ago. The Social Media network site used by most respondents was Facebook. Blogs, YouTube and Twitter were also used but not to the same extent.

5.2 Budget decision
Budget spread

Those who use TV as media also use a substantial amount of their advertising budget into it, making it one of the larger posts when looking at the general budget spread among respondents. Nine of the respondents claimed to use web as a channel, but only six of them stated to put investments into it. This absence from advertising budget was stated as due to promotion on own homepage and a cost effective use of Social Media platforms as a "free media" for publicity. A Common perception was that many online forums like Social Media networks was almost for free, one respondent tried to explain their view of this as: "I wouldn't say it is actually for free, it just is there, for everyone ..."

Investments in Destination marketing, catalogue, event, radio, out-door printed goods, search engine optimization, cinema and PR were varying in respect to different business area and nature of products and services promoted by each company.

Changes in media spending

Even if there has been an increased in the usage of some media forms, especially web, a corresponding increase in budget spent on online activity is not observed by many companies. Many stated that the investments put into web was of more technical or human resource caliber, and therefore did not show up as any lager investments in the advertising budget. One respondent expressed their view on Internet investments as:"The increased investments on web is, in a sense, done in order to eventually get access to practically free advertising space online, like blogs or similar".

Changes in the biggest media post were varying, to a large extent it coincided with changes in media usage. A few of the companies had experience no change in the biggest media post in ten years, this they explained as primarily due to business specific factors, for example heavy in catalogue (retail). Traditional media still dominated.

Investments in Social Media

General view on Social media is that the monetary investments are low. The investments that are made in some companies are smaller sums for education, and participation in seminars and conferences for employees. Common picture is, that the one running and managing the social media networks should come in-house, and know the brand and company culture in order to interact with customers in a value added manner.
Investments in media bureau competence in Social Media had been made by some. In those cases the help had concerned Social Media as smaller parts of a larger campaign setting. The bureau help did therefore, in general, not concern Social Media specific. In these cases bureaus were also active in putting up guidelines in social media strategies.

Investments in new competence

A general trend among many companies is to invest more on in-house competence, especially on the digital side of the marketing department. Three of the companies however had instead increased their external media bureau involvement. Were a majority of the advertising production was out-sourced, in return the competence in-house had developed to be more management orientated.

To Conclude: The increase in media usage in web is not corresponding with the increase in budget on web based activities. There is a common conception of Internet as a "free" advertising medium. Over all, the respondents have increased in-house competence in areas of web marketing and social media competence. However there are also companies who invest more in out-sourcing production and instead focus more on management and project leading.

5.3 Message decision
Message to consumers

All of the respondent, which all have built a strong brand, emphasized the importance of keeping the message consistent over time to further induce the strong brand image and atmosphere established. Over all the messages are short, concise and clear, and strives to capture the objectives and essence of each brand. The chart displays all individual responses and their key values.

Changes in communication landscape

There is a clear and unison opinion among the respondents that the media market is more fragmented today than before. Many were convinced that the competition and media noise has increased substantially over the years. This was seen by some of the respondents as a more complicating factor, making it harder to manage your advertising message. This also demand more organisational skills today, in order to bring the different parts of the campaign together and keep a consistent message throughout the whole communication.

Others were rather of the opinion that a more fragmented media market with new channels has made it easier to reach customers, and foremost easier to reach the right consumers. Investments in banner advertisement were considered more cost effective, since behaviour targeting allows the message to be exposed only to target customers. As one of the interviewee expressed it: "The competition of the customers has indeed hardened, the media noise has increased, but in return so has the number of possibilities to reach customers. It is not harder to reach customers today, the need for information has not changed, the number of ways to provide it has just increased". Another respondent expressed the better possibilities to reach the "right" customers with message today as: "A more precise communication is the key to success, it comes from being able to use the resources more effective." Another interviewee put it as: "With the same amount of money, I would say that we can reach more customers today than ten years ago".

The increasing media noise was by many addressed by keeping a greater focus on consistency today, and to have an even clearer and more simple message in all media simultaneously to get through. There is also a common voice that consumers have higher expectations of message today. To get through many use emotionally and aesthetic content that appeals to target customers, to arouse a reaction is more important to day than ten years ago.

Communication strategy in Social Media

All of the respondents were of the opinion, that in order to exist on Social Media platforms, there need to be clear guidelines and a pronounced strategy regarding the content. Things that the companies had given attention and decided upon were for example: when interacting with customer who is stated as the sender: company name or individuals, policy when answering questions and person responsible for posting what. The interviewees were each and all in consensus on three particular points: that these media require planning, a pre-stated proposes and time to maintenance and not a forum to rush into. One interviewee expressed; "if you start a page and create a lot of attention but don't have the resources to maintain, it will die and become another web-cemetery among many"

A majority used these channels in a more brand building sense by encouraging interaction for example by posting comical, informational or news related content or perhaps through competitions with incitement in smaller winnings. A few expressed it as a forum for news and releases to inform customers, and give an exclusive insight to the company. Many pressed on the importance to give value back to customers through their page. Important to all companies is, that the person in charge is from within own organization and knows the brand in order to answers consumers and make relevant posts. The person in charge for Social Medias did this in addition to original work tasks. The time spent on managing was often moderate. None of the companies using social media sites had appointed a person working solemnly with their Social Media.

Many of the respondents expressed an insecurity of how to get the best results out of a Social Media. They referred to it as a relatively unexplored media, that had many softer values of brand building character that was important but hard to see or measure, such as loyalty or likability. Many stated that Social Media presence demand an increased transparency in a company, this was according to the respondents a step in line with current trends that

companies need to be more open. Customers are in turn more empowered and have higher demands. A Facebook page could give more transparency and in effect increased credibility and reliability. The Facebook site was also considered by some as a good opportunity to get valuable consumer insights and to help them improve their offer.

Some of the companies actively used viral marketing on Social Media page in collaboration with events to create a buzz effect. There were also a few who used Product Seeding and Influencer marketing through targeting influential bloggers with product sample and events.

To Conclude:

The media landscape is more fragmented today due to new web based channels. By using these channels more effectively, the "right" customer can be reached more easily today. At the same time the media noise is greater, and puts an increasing demand on management skills and bringing all parts of a communication together. The entry in Social Media needs to be preceded by clear objectives and strategy; the presences should give value back to consumers. The primary target for use of Social Media is brand building through affecting attitudes and create positive reactions.

5.4 Interview Summary

The interviews of all different companies have provided a broad and colourful insight in the evolvement in advertising strategy on a ten year period. The sessions have enlightened the view of how media, budget and message decisions have been affected with external changes of technical progress, and the altered consumer behaviour online. It has also helped to broaden the concept of Social Media, and gain material to conduct a further discussion and to cross reference with current situation.

6. Analysis

The analysis is based on the subjects recorded in the literature review, key concepts and statements made in earlier research will be presented and followed by a discussion as to its consensus with the empirical findings. Similarities and diverges will be disclosed, and a reasoning of underlying causes will follow. The headlines are collected from the three main headlines that constitute the literature review.

6.1 Marketing and Internet
"Increased transparency and empowerment of consumers"

This is consistent with the interview findings. Companies stated that an increased transparency was one of the effects of increased web presence, especially when interacting with customers in Social Media.

Before entering Social Media the companies have reflected of the increasing empowerment of their consumers. This empowerment could discourage companies because of the increased demand it adds. When the transparency increases and you let the customer gain deeper insights into the organization, the requirements of the company increased in more areas than just the original product or service provided. The increasing empowerment of consumers due to interaction was however not entirely a negative factor, it was also considered to be an asset. Many were hopeful to the new ways of direct customer interaction and to be able to hear their opinions first hand. Social Media could also function as a forum for customers for improving the company, and contribute to make it even more successful and appealing to others.

Even though many companies have a vision, that Social Media will be a greater forum for more insights and greater exchange between consumer and companies, there is a discrepancy between the resource focus Social Media are getting and the hope some are putting in them. The general opinion of Social Media is very serious with objectives and pre-sated purposes, but actual efforts invested were often moderate. All agreed that it was time consuming, however the general time each responsible person put into social media were very low in respect to other work tasks.

This could be because the media itself is free, if left neglected no real investments will be lost, neither will anything be gained. Social Media metrics are diffuse and adds to softer values

like brand image rather than increased sales. It could therefore be hard for companies to find good incentives for the management that Social Media should be given larger funding.

"Expectations of openness has amplified"

Existence in Social Media networks has led to higher demands of openness from consumers. Companies state that the obligation to answer questions and always be present has increased.

An opinion was, that if you enter Social Medias to create attention and involve people, you need to make sure that you have the resources to handle the task, otherwise there is the risk that the site will end up as an inactive web-cemetery.

Expectations of company vigilance and presence have increased in Social Media due to its nature. Having an open forum directly linked to the company, that can be accessed any time of the day, increases demands on the company's response time. Previous interaction routs to companies have been restricted by phone hours and office time in a way that a community site is not. This also increases the resources required to handle the traffic and interaction from the customers. When inviting to a more relational interaction with consumers, vectors like emotions and likability are added to the equation which could be just as good for the brand image as it could be damaging. If handled poorly a Facebook page could be turned into bad publicity.

"Banners, Behavioral Targeting and Search Engine Optimization"

The use of new web advertising solutions, defined in this thesis as banner advertising, use of Behavioral Targeting and search engine optimization is a present and increasing part of many of the companies media mix.

Most of the companies are still mainly focused on the traditional media, but a general increase or intended increase in efforts on web advertising was observed within all companies. This additional effort in web was however not necessarily shown in increased budget posts, even if many recorded that expenses for this had increased some. Increased budget post for this is however somewhat different from what would be expected in literature review. Many of the main budget posts were still in traditional medias like TV and print, and have remained the same for the past ten years. The fact that web has not increased as much, was also due to that investments today are rather put into developing competence in hard and soft-ware, as well as in an increased in-house competence. This could be an indication that these media,

even if they have been around for quite some years, still are very new and unexplored to some organizations. Another reason stated, was the increased effectiveness in which web mediums could be used. Through the use of a more accurate targeting metric, a smaller investment could be sufficient for an equally large media effort. This could best be explained by a scenario were web was given the same media space as a traditional media like TV in a campaign. The real investments, however, would be smaller in web ads since it doesn't take the same amount of impressions to expose the target group to the message, as it takes aired time to reach an equal amount in TV.

"Simultaneously media consumption is gaining in popularity"

The usage for medias used simultaneously in campaigns has increased in the last ten years. This is in line with earlier research, were the behavior to consume media content in several channels simultaneously is increasing in Sweden. In reference to this, the media landscape is more fragmented today than it was before, and that picture is consistent in interview findings as well as in literature review.

This evolvement should be a result of an increased use of several media simultaneously in combination with the added web-products to the media channels. There was a trend among the companies to often use more channels today, than they did before, rather that substituting them. This results in more media channels being used in total and that they are used more simultaneously, which would add to the increased complexity of the media landscape.

A more fragmented media landscape has in turn lead to an increased use of the same message in more channels, as oppose to before when the message could be sent out on prime time TV and reach half of the Swedish population. This is reflected in an increased focus to align the campaigns, and remain consistent throughout all channels used for the communication. This has increased the demands on management and coordination efforts according to many. This is supported by the following statement, that the media channels are used in more deliberate and simultaneous way today.

Another effect, that the fragmented media market has had on communication, is the increased importance for emotional and diverge ways to separate themselves from competitors. A better use of visual attractive content and connection to "core values" for target customers are

responses to this. This is consistent with earlier research, which indicates that many use creativity for executing more vivid and innovative campaigns.

What the literature did not expressed as an increasing area was the higher demands on competence today that companies expressed. Planning and managing campaigns is becoming increasingly important according to them, and the demand on marketers to unite forces in many more channels has increased. This trend could however be a biased statement, since the interviewees all are managers and in most cases are responsible for this particular part in advertising. That they find this area particular important could come from personal involvement in the question. In another sense you could say that just because this is their main role, they would be the experts on the actual changes in that area. The absence from earlier findings could be due to lack of previous disclosure.

6.2 Advertising today
"There is a more tolerable attitude towards media in traditional channels"

Most of the companies are still mainly focused on the traditional medias as stated above. A limited observed effort in budgeted money and time spent on particularly Social Media indicates the same situation. Many of the companies express an entry in Social Media as a well-planned action with pre-stated purposes. This was an action you shouldn't rush into, since the consequences could even be bad for the brand.

As stated before, many seem rather to put investments in developing technology than putting money to perfecting it, and using it further. This would support the idea that this indeed is an area were the knowledge is scarce. Many companies remain passive and wait for others to make the first mistakes and clear the way for success. This is further supported by the fact, that many of the companies stated that a knowledge of the brand was more important than expertise on Social Media. Often a basic competence of the Network site's functions was sufficient to manage them. This could imply that when it comes to Social Medias, there are few predecessors, many seem to act on own accord with brand specific approaches.

Many also stated that forums like Facebook or Twitter was often used in a brand building sense rather than in a promotional way. This was mainly due to the nature of the platforms, since it encourages for comments it should therefore be used accordingly. Another reason for this could be the fact that advertising online is not perceived as positive as it is in other

traditional media. The fact that a too promotional approach on a Social Media could be considered intrusive, could have affected the companies in their strategy and coincide with literature findings.

6.3 Advertising and Social Media

"The usage of social communities has exploded"

The presences on Social Media sites have definitely increased during the last ten years, since the concept hardly existed back then. The clear engagement was shown when eight out of ten respondents are present and active in Social Networks.

The increased presence in Social Media for advertising efforts has however not resulted in any large budget changes. All of the active respondents had invested few sums in the media. There was some amount of spending on education and bureau competence, but hardly any considerable amounts. Once the page was launched, many respondents considered the media as a practically "free" advertising tool. The actual efforts into Social Media are, as stated above, scarce. The fact that companies view Internet as a free medium shows that they, like the consumers, do not expect to pay for things online or expect to give anything in return for Internet content. Internet has the potential for such a large number of utilities, especially in communication that are free for all. The start-up cost for a company's Facebook account is for instance zero. All it takes is knowledge of the different possibilities.

There is a general attitude to explore possibilities for free advertising online, and be smart with linking events and releases and physical content with viral spread.
In this way Internet is not a place where you actually can create the attention, but rather a tool to spread the rings of it further. If you know the media and its potential for viral spread, it could in a few seconds be spread to thousands, and thus become free ad-space.

It could be this type of non-monetary investment that companies actually use Internet for mainly. The real investments will be put in another part of the media mix, like event or product launch, and Internet will in effect be nothing more than a tool for spreading this effort further. With this type of view on Internet, the need for knowledge and to be updated on trends is gaining in importance, it becomes vital to be able to use the free parts of Internet at its maximum. This is supported by the increasing trend in investments in in-house competence, and the small but yet existing investments in education made by companies.

7. Conclusion and implication

Thesis question:

"In light of the rapid increase in Internet usage during the past ten year in Sweden, how has the advertising strategy of companies active on the Swedish market changed, in terms of budge decisions, message decisions and media decisions? And to what extent is Social Media used in advertising among companies on the Swedish arena?"

To answerer the question in what way advertising is different today in media message and budget, and what role Social Media plays in this, the analysis was done by discussing the following subjects in a context of earlier research.

The biggest change in the media is definitely the introduction of web solutions. These defined as; own home page, interactive display Banners and Search Optimization tools. On top of this is the introduction of advertisement on Social Media sites, being primarily Facebook, YouTube, Twitter and blogs.

The media landscape is more fragmented today with more channels to communicate through now. Adding web solutions to classical media channels induces this development. The trend to rather add than substitute media channels has also contributed to the situation. The more common behavior among Swedes to consume media content through several channels simultaneously, i.e. watch TV and be online at the same time, further support this strategy.

The effects this has had on advertisement strategy are changes in message decisions. The message communicated today needs to be clearer and more comprehensible in order to engage consumers. The communication is more focused on catching people's attention, and requires emotional connection to larger extent today. To be remembered and to get attention, the message and emotions needs to stand out and be set apart from competitors in a different way. This has in turn put higher demands on management to coordinate the campaign, and assure that all message communication is consistent.

The changes in investments are shown primarily through investments in new competence, mostly in web knowledge. Many acknowledge the evolution and its future in their organization, and make sure to acquire this competence in-house. These types of investments did however have no effect on the actual advertising budget due to the nature of the investment.

Another competence that has emerged during the last decade is the demand for web production like banner displays and campaign planning. Some companies do this in-house, but most of them out-source this to media bureaus (advertising coordination, services, programming). The media bureaus have a prominent role in providing services in these areas and are used by companies not only for assistance in media purchase but also as digital advisors. Few companies relied solemnly on bureau competence, but almost all had outsourced some parts. There were however some indications that the usage for in-house competence had increased, exactly how this reflected on media bureau spending is harder to tell. There were some indications that tasks made through bureau before were now preformed in-house. At the same time an increased use of banner advertising, and subsequently larger investments, are observed. We therefore remain neutral to whether media bureau investments has overall increased or decreased.

The demands for better coordination and management have increased with a complex media landscape. Whether this coordination is gathered from bureau or in-house, the model of working in campaign concepts is getting increasingly important. The need to tie different communication tools, example events and viral spread through communities, is therefore given more focus.

The increased complexity is however not viewed as entirely bad. The possibilities for the channels today have opened up for, not only, more ways to communicate, but also a better chance to target particular consumers. Banner display advertisement and other online promotion have the advantage to reach specific segments through behavioral targeting. The ad investments are more effective if you see to money invested in medias like Social Networks and the synergy effect it is meant to achieve.

In short: The amount of media channels on the market have increased, the amount of medias used simultaneously has also increased. This has resulted in more media channels used in total and a more complex media landscape. This complexity has lead to an increased investment in web competence and coordination efforts. It is also reflected in changes in the message, which now more than ever needs to be clear, consistent and easy to understand. The use of more visually and emotional appealing ad-content to attract attention has also increased due to this. The clear increase in web-based media is not mirrored in the budget spread, primarily three factors were found for explaining this:

1.) The fact that monetary efforts online are rather spent on developments in technique and human resources, than in actual advertising actions. 2.) That the medium is relatively cheaper than the traditional ones, and can be used more cost effective through targeting 3.) Internet is not actually used as an own adverting tool, but as a free mean to create viral attention around physical advertising efforts like events and product launches.

8. Discussion, Limitations and Further research

8.1 Discussion

The conclusions we have made are done on the over all, largest changes on the three areas media, budget and message. The conclusion states the biggest and clearest changes that separate the advertising arena today from the one ten years ago.

We have observed a chain reaction that started in the development of new media forms on the web, and a consumer movement from traditional media channels to online ones. The observed behavior of the companies in this study, stated a clear trend to incorporate these web media into their media mix in an increasing manner. However they still remained focused on traditional media channels. The behavior has lead to an overall increase in number of medias used. This has made the advertising world "more complex", which has in turn affected the whole process. It is from this starting point the changes in budget and message have been discussed. The underlying factors for conclusions on budget and message factors depend largely to the situation stated in changes in medias.

In the interview the companies has given an overall common picture over this development. Due to the difference in nature and business area of the study group, many factors of investigation were diverging. The art of the product or service that the companies offered of course affected some aspects of their advertising strategies. For example, retail companies had larger focus on in-store display and catalogue than an online based company. Focus was however always on the overall and underlying thought on the markets, and the general points in advertising. The interview design strived to see through the differences in detail and high-light the general, important changes. This is however very difficult to assure.

A further study, using business specific study objects, could provide the information needed to decide what is business related and what are common market changes. By doing a related study of companies, in a similar business area with identical product offers, this study would be put in a better perspective. It would facilitate in ruling out points of error that actually was only observed in specific business areas. We have therefore chosen to keep our final conclusion limited from details and exact managerial implications. The analysis discusses several possible trends, and argues for their existence with background to earlier research. All of these points are however not transferred to the conclusions. The overall reasoning and the major subjects will be mentioned and lifted in this part but not all possible outcomes are disclosed.

The conclusion is not divided into paragraphs of clear bulletins, but instead follows a causal reasoning, ending in a short conclusion of the major changes. The emphasis on Social Media usage by companies has been given attention in literature review, and it is incorporated in the concluding argumentation. To keep the conclusions as open as possible, it is a conscious choice that follows from the limited room we have for generalization. A further discussion on generalization follows in limitations of study.

8.2 Limitations of study & further research

The limited room for generalization comes from the model of study we have adopted. A qualitative study with non homogenous group has left us with many variables to compare. Due to the limited scope if this study there is neither room nor time to investigate all of these. The conclusion is therefore more descriptive and applies only to evolvements on the Swedish market. The study area of advertisement strategy only concerns the operational parts of the model. This limits the thesis as a tool for evaluation evolvement in advertising strategy. A more complete picture would be delivered if these were included.

Further research could include the participation of media agencies who are the suppliers of advertisement. This would give better insight in their view on the market, and additional information in how they perceive this change. Research on bordering subject like internet affect on brands or Social Media‟s future role are subject that we would find very enlightening. The need for more studies on this subject is obvious. The rapid evolvement of this round, in technology and in trends, has contributed to the lack of new research.

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Blocket.se:	*Anna Björklund, Marketing Manager*
Fjällräven:	*Jerry Engström, Marketing Manager*
Google:	*Andreas Svenungsson*, *Head of Communications & Public Affairs*
Google*:*	*Daniel Rytterström, Agency Relation Manager*
Hitta.se:	*Johan Nordquist, Marketing Manager*
Kexchoklad:	*Claes Ekström, Brand Manager*
Lego:	*John Andersson, Marketing Manage*
Liseberg:	*Kent Kierdorf, Marketing & Sales Manager*
Orrefors*:*	*Malin Ljungström, Brand Manager*
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Appendix

Appendix 1 – Company Presentation

Audi

Audi is a German car manufacture, and is mainly owned by Volkswagen since 1965. Audi is a listed company in which Volkswagen owns 99.55%. Audi Sweden are part of the Swedish Volkswagen AB. Audi was founded in 1909. (Audi Sweden, 2011)

Blocket.se

Blocket.se is a marketplace for buying and selling new and second-hand goods. It was founded 1996 and acted was acquired by the newspaper Aftonbladet in 2003. (Superbrands, 2010)

Fjällräven

Fjällräven is one of Europe's leading outdoor companies. It has developed, manufactured and sold functional, durable outdoor equipment since 1960. (Superbrands, 2010)

Google

Google is not just a search engine, they has a variety of different products, such as YouTube, Chrome, Maps and many more. In January 1996 two Stanford University students developed a search engine which two years later became the worlds today most popular search engine; Google. (Superbrands, 2010)

Hitta.se

Hitta.se is a directory service and provides telephone numbers and addresses as well as maps and satellite images of all addresses and locations in Sweden. It was launched in 2004 and acquired by Aftonbladet in 2005. (Superbrands, 2010)

Kexchoklad

Kexchoklad are chocolate covered wafers bars produced by the candy giant Cloetta. It was launched in 1921 under the name "Five o´clock kex -choklad", but was renamed to Kexchoklad in 1938. (Cloetta, 2011)

Lego

The LEGO® brand is one of the most famous toy brand in the world. They have developed and market a wide range of products all with the same basic philosophy of learning through play. LEGO was founded in 1932 in Billund, Denmark. (Superbrands, 2010)

Liseberg

Liseberg is Scandinavia's largest theme park, located in Gothenburg. The park is runned as a public limited company, entirely owned by the municipality of Gothenburg. It was opened in Gothenburg 1923. (Liseberg, 2011)

Orrefors

Orrefors Kosta Boda AB is a design company with production and manufacturing of utility and art glass. Orrefors is the largest Nordic glass producer and was founded back in 1742. (Orrefors, 2011)

Systembolaget

Systembolaget is a government owned company that has a statutory monopoly in Sweden on the retail sales of spirits, wine and beer that has an alcohol content exceeding 3.5 vol. (Systembolaget, 2011)

Appendix 2 – Framework Interview Questions

Media

What communication medias do you use?

What changes have you seen in the choice of media for the past ten years?

Which media stands for the biggest part of your press release today? Communiqué?

What media purchases has increased respectively decreased the most at your company during the last ten years?

Do you use multiple channels simultaneously for advertising campaigns?
- Has the number of media used simultaneously increased or decreased past ten years?

Do you use other media such as blogs, Twitter, Facebook, YouTube?
- Who is responsible for these? / Where du you get skills for this?
- What has this person for skills / training / background?
- How long have you been active in these forums?

What is needed to make this forum into a profitable venture in your view?

Budget

How is the budget spread between the various advertising media you use?

What was this spread like, ten years ago?

Have focus on the Internet increased over the years?

Which is the largest budget post due to marketing?

Which was the largest budget post ten years ago?

From which budget is money taken for investments is social medias?

Have you invested in education or external expertise (e.g. consultants, bureaus, agencies) in social medias?

At your company, how many are working at the marketing department today?

Have the number of co-workers at the marketing department increased or decreased the last ten years?

Why is that, and what competence has been added or removed?

Would you say that you get more out of advertising investment today than 10 years ago (range)?

Which media is the most expensive respectively chepest to purchase for you?

Message

What campaigns have been the most successful for you?

Why was this particular campaign so successful at this time?

Have developments in technology opened up new ways to reach customers in your view?

Do you experience it as harder or easier to reach consumers today then ten years ago?

    -How is it possible to handle this change? What actions have you taken?

What is the most important you have in mind when designing advertising campaigns?

What is the most important to deliver in form of message to the customer in your advertising campaigns?

- What message are you communicating?
- Has this message been changed the past ten years?

How important is Internet for your communiqué with your customers?

Attitude

What is your opinion about Social Medias?

Do you believe that Social Medias is a/an: effective media channel? Is it profitable? Is it serious enough? Does it have a future within your company?

What is about to happen due to evolvements in this area in a near future?

Is it even possible to know how to execute campaigns over Social Medias correctly? Are there any predecessors? Where to find the competence?

Is Social Media just a hype, or is it here to stay?

Are different kinds of competence required today than before due to a technical, creative or educational approach to create successful commercials?

Is it possible to measure results on Social Media campaigns? How to do it?

Appendix 3 – Charts, Figures and Graphs

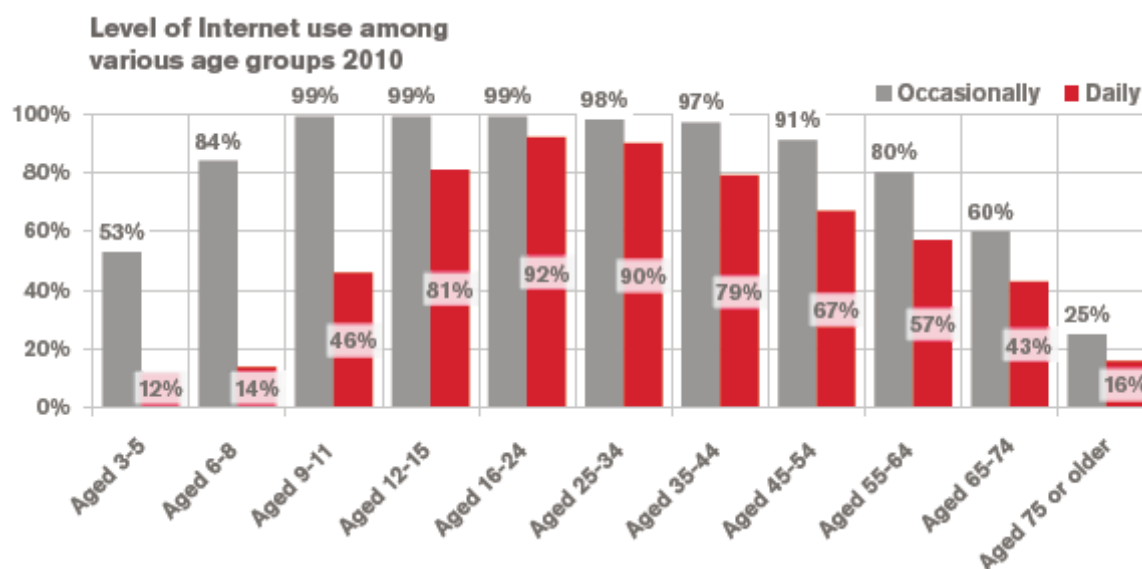Chart 1.1- Percentage of various age groups that use Internet on occasion and on a daily basis

Level of Internet use among various age groups 2010

Chart 1.2- Average time (hours/week) that Internet users spend online at home
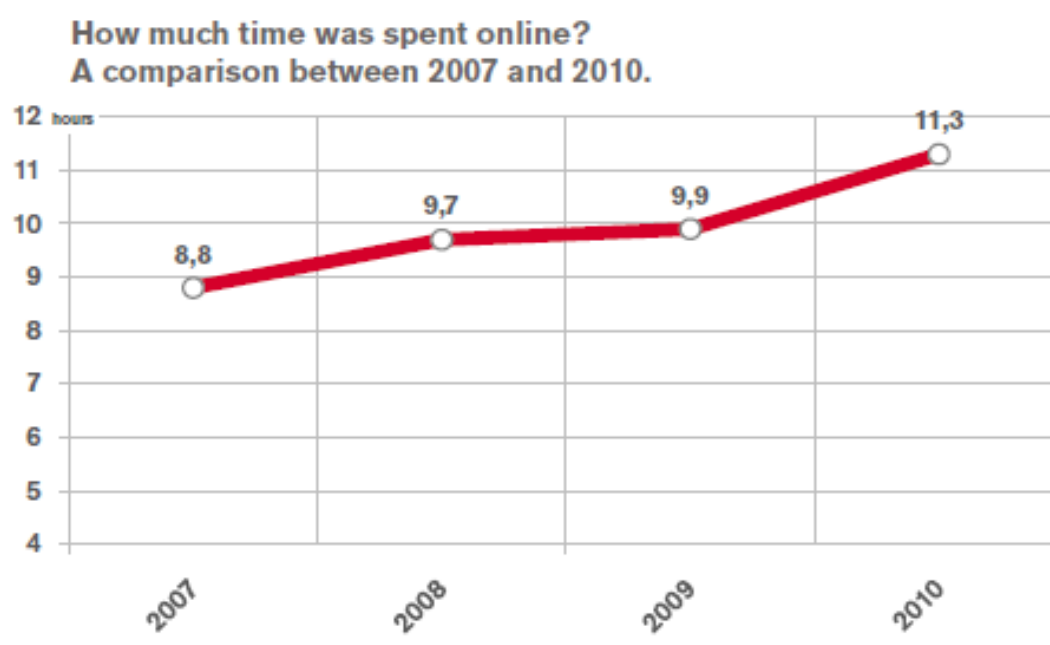

How much time was spent online?
A comparison between 2007 and 2010.

Chart 1.3 – Percentage of Internet users that engage in other activities while simultaneously being online.
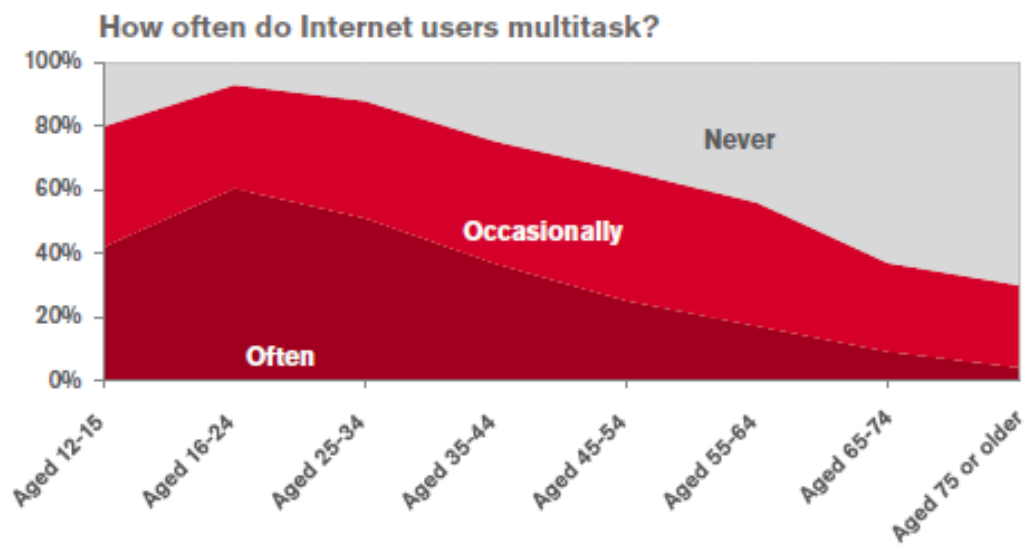
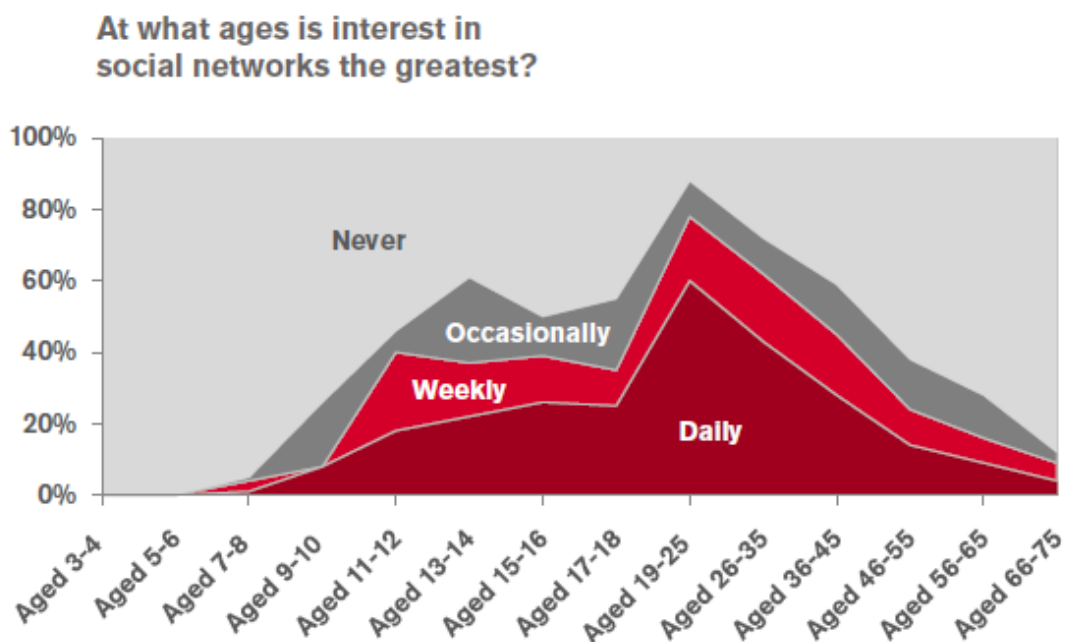Chart 1.4- Proportions of Internet user who Participate in social networks in varying frequencies

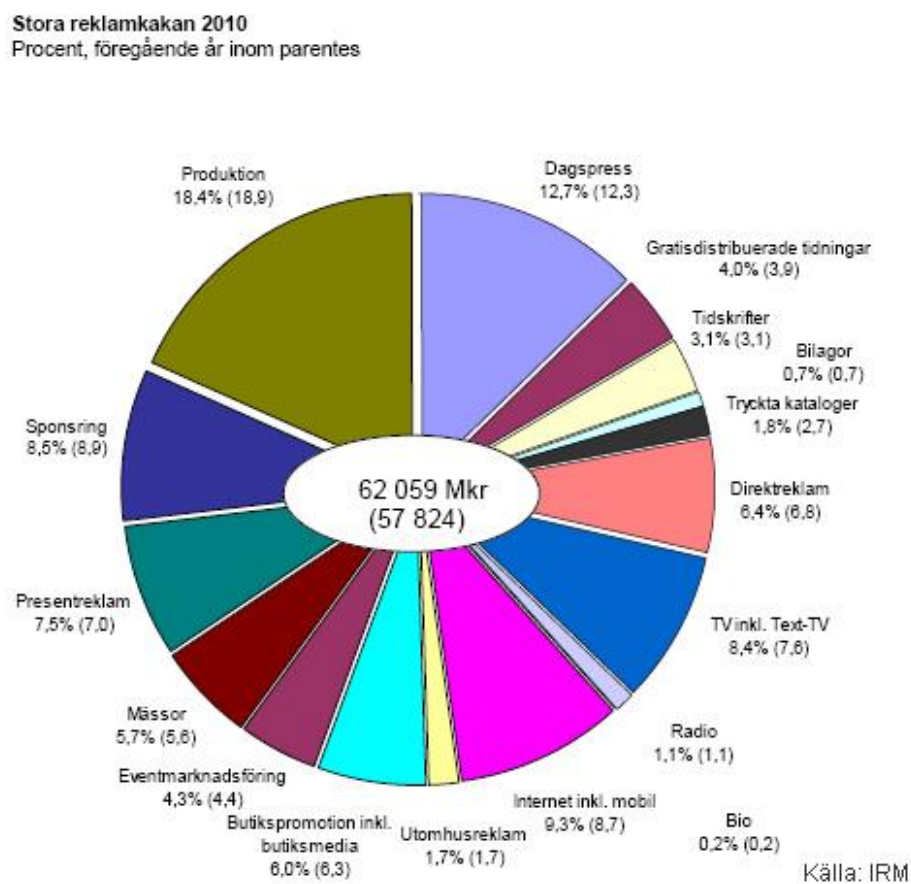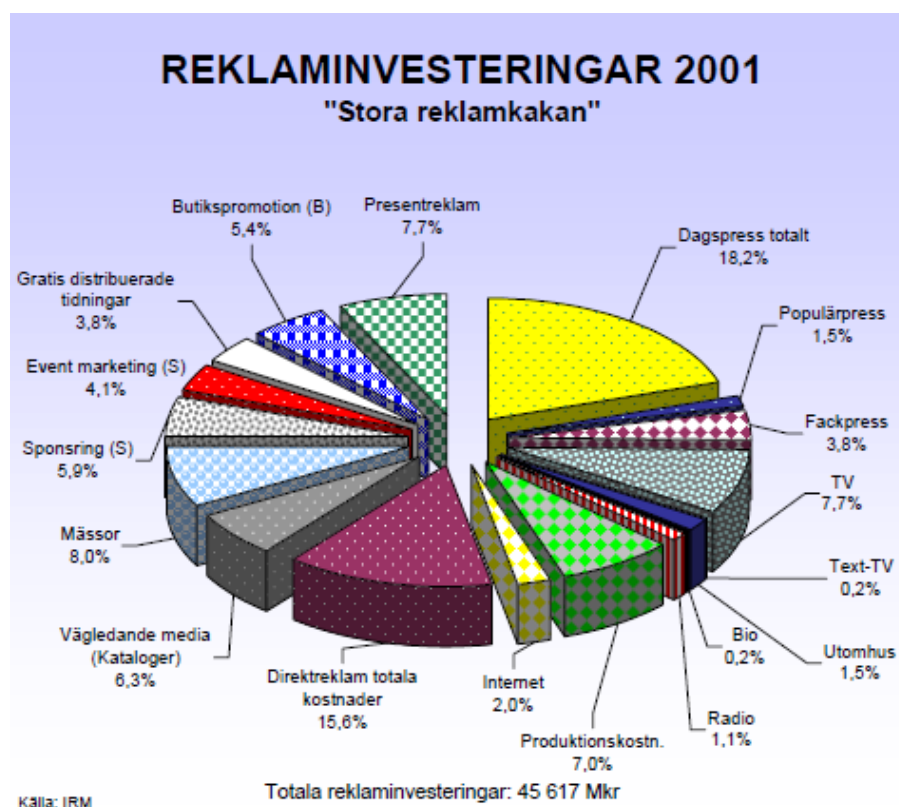Chart 1.5- Advertising investments, Stora reklamkakan 2010 IRM

Chart 1.6- Advertising investments, Stora reklamkakan 2001 IRM

Appendix 4 – Model of Study, Superbrands

1. TNS SIFO Research International performs a qualitative study where Sweden's 400 strongest consumer brands are identified. This is performed by letting their own consumer panel judge 2300 famous brands that Superbrands themselves has nominated. In their judgment the panel will consider knowledge and overall impression of each brand. The Brand Council is composed of individuals with extensive experience of brand management and is elected on an annual basis. Every Brand Council member represents industry in the Swedish market in order for the study to be as optimal as possible. Jurors are not allowed to assess brands that they represent nor can they assess immediate competitors.

2. Superbrands Brand Council then carries out a qualitative assessment by nine criteria of the top 400 consumer brands that TNS SIFO Research International has identified. The 300 highest ranking receives Superbrand status. In the assessment, Brand Council takes in consideration the following definition of what qualifies as a "Superbrand";

»In comparison to its competitors a Superbrand offers in B2B/B2C significant emotional and/or rational benefits and to that, additional benefits to the customer that they consciously or unconsciously they are willing to pay extra for. «

3. As a last step TNS SIFO Research International performs a deeper quantitative brand research that leads up to a ranking of the year's 100 most powerful Superbrands. In this study the brands knowledge and strength based on nine emotional image attributes, these attributes are part of TNS SIFO Research Internationals official Brand model and are; heritage, trust, innovation, unity, solidarity, nostalgia, prestige, acceptance and role models.

Appendix 5 – Glossary

Facebook: Is a social networking service and website launched in February 2004, Facebook has more than 600 million active users.

Mobile advertising: Refers to a form of advertising this is communicated to the consumer through a phone. This type of advertising is most commonly seen as a Mobile Web Banner (top of page) or mobile web poster (bottom of page banner). Other forms of this type of advertising are SMS and MMS ads, and mobile gaming.

Public relations (PR): Is a field concerned with maintaining a public image for businesses, non-profit organizations or high-profile people, such as celebrities and politicians.

Smart phone: Is a mobile phone that offers more advanced computing ability and connectivity than a regular cell phone. It can connect to the Web and multitask various applications.

YouTube: Is a video-sharing website on which users can upload, share, and view videos, created by three former PayPal employees in February 2005.