

**An Investigation into the Brand Awareness of Small and Medium Sportswear
Companies Within Ireland**

By

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Dedicated to Phoebe and Odin
Fondly Remembered

Declaration

To Whom It May Concern

I hereby declare that the research conducted in this dissertation for the award of M.Sc.
in Marketing is all my own work with the acknowledged exceptions.

Signed:

Steven Mc Carron

Date:

11.11.10

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List of Abbreviations

CEO - Chief Executive Officer

GAA - Gaelic Association Office

SME - Small and Medium Enterprise

UK - United Kingdom

USA - United States of America

Chapter One - Introduction

1.1 Introduction

This dissertation aims to investigate the brand awareness of small and medium sportswear companies within Ireland. The aim of the investigation is to discover how a selection of companies creates brand awareness of their product to the public. This research aims to discover if the companies' strategies are in line with the perceptions of the customers. The researcher will then examine if the companies are able to adjust their strategies to align with the perceptions of customer. At the end of the research, the researcher hopes to be able to make recommendations that will help increase the awareness of the selected Irish sportswear companies.

1.2 Research Problem

The aim of this dissertation is to investigate the brand awareness of small and medium sportswear companies within Ireland. Ireland has a large proportion of Small and Medium Enterprises (SMEs) operating in the country and it is an aim of the researcher to investigate how such sportswear companies brand their products within their market. Although a number of global sportswear brands operate within the Irish market, this dissertation aims to look at Irish companies O' Neills, Azzurri and Jako.

Kotler (2000, p.285) defined branding in an uncomplicated and concise fashion. He sees branding as, "a name, term, symbol or a combination of them, which is intended to signify the goods or services of one seller or group of sellers and to differentiate them from those of competitors". As such, the objective of branding is to stand out from competitors. To do this, a company must try to create awareness of the brand to potential customers. Once customers are aware of a brand, these customers may become loyal to the brand over time. Consequently this can be a long and expensive objective for a company. According to Grimaldi (2003) "it takes as much time to build a brand as it takes a person to build a reputation". So if a company decides to reduce their overall budget, it therefore leads to a reduction in the marketing budget. This has potential to lead to a reduction in public awareness of the brand which will

impact the loyalty of customers. Throughout this dissertation, it is hoped to obtain a view of how branding can have a positive impact on sales due to the power of the brand and increased public awareness and customer loyalty.

1.3 Aims of the Investigation

The main objective of this dissertation is to look at the role of branding in small and medium sized sportswear companies that operate primarily within the Irish market. Through this investigation it is hoped to analyse the impact of branding on the awareness on these companies and what impact the recession has had for the selected companies. It will also examine the level of brand awareness of specified companies and if there is a level of brand loyalty and the purchase intentions of current and potential customers.

1.3.1 Primary Aim

The primary objective of the dissertation is:

“To discover how Irish sportswear companies brand their company and products within the Irish market”.

1.3.2 Secondary Aims

The secondary objectives come from both the primary objective and the literature.

These will be:

- How do Irish sportswear companies create awareness of their brand?
- Do these companies try to enhance loyalty to the brand over the competitors?
- Have these companies adapted their strategies as a result of the recession?
- How do customers perceive the companies?

By obtaining the answers to both the primary and secondary objectives, it is hoped to obtain a greater insight into the effects of branding on sportswear companies that

operate primarily within the Irish market. Also, it will give an insight into how different companies adapt their strategies due to a recession to allow them to remain competitive.

1.4 Outline of Chapters

The first chapter of this dissertation identifies the research problem the researcher hopes to address from the research. It will highlight the aims of the research and also the primary and secondary objectives. It will then give an outline of the chapters that will follow.

The second chapter of the dissertation will be a literature review of the available secondary research. This chapter will look at brand awareness and brand loyalty while looking at SMEs due to the importance to the Irish market. It will also look at the sportswear industry and the effects of the recession

The third chapter of the dissertation will look at the research methodology that the researcher will use throughout the research process. In this chapter, the various types of research required for the research will be examined in-depth.

The fourth chapter of the dissertation is the findings and analysis. This chapter will present the findings from the researcher's primary research in a presentable format. The researcher will discuss the main topics in this chapter in relation to the objective that were set out in chapter one.

The fifth chapter of the dissertation is the conclusion and recommendations. The researcher will give their opinion on the results of the research and offer recommendations in relation to the research problem that was investigated. The researcher will also discuss limitations of the research and area of potential further research.

Chapter Two - Literature Review

2.1 Introduction

The purpose of this literature review is to obtain an insight into the broad area of marketing followed by a look at the history of branding and what is a brand. Once an insight of these topics has been achieved, the literature review will look at brand awareness and brand loyalty and the importance of these topics in relation to branding. Following that, the literature review will look at SMEs due to the importance to the Irish market. Next it will look at the sportswear industry globally and in an Irish context. The following section will look at sportswear branding and the final section will deal with the effects of a recession.

2.2 Marketing

According to the American Marketing Association (2007), “marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners and society at large”. This statement incorporates all the facets of marketing. This takes into consideration various aspects that are not connected to the company such as the customers and society. This view is similar to Palmer’s (2000) that “marketing can be seen as a system which must respond to environmental change”. While these are the most recent acknowledged views of marketing, Egan (2008, p.3) states that much of what is known today of marketing actually existed long before its formal beginnings as a field of study. Egan (2008, p.3) adds that:

From the time of the ancient Greeks through the great economists of the 1700s and 1800s (including Smith, Malthus, Jevons, Ricardo, Mill, and Marshall), concepts such as markets, marginal analysis, value, production, humans as social and economic entities, competition, and the role of governments had already been raised and extensively debated.

According to Hunt (1976, p.19), “no matter which definition of marketing one prefers, the scope of marketing is unquestionably broad” and that many topics may not be

included. Hunt (1976, p. 19-20) explains that breadth of the topic in a similar way to Egan (2008):

Often included are such diverse subject areas as consumer behaviour, pricing, purchasing, sales management, product management, marketing communications, comparative marketing, social marketing, the efficiency/productivity of marketing systems, the role of marketing in economic development, packaging, channels of distribution, market research, societal issues in marketing, retailing, wholesaling, the social responsibility of marketing, international marketing, commodity marketing, and physical distribution.

From examining the previous statement, it is noticeable that marketing incorporates a wide variety of topics that all have a different role to play. Similarly, it is noticeable that the view of marketing will vary depending on the authors personal views.

According to Egan (2008) and Hackley (2009), modern marketing studies came about in the 1950s and 1960s. Hackley (2009) believed that this was when marketing studies became present in universities in the United States of America (USA) although he states that marketing studies “did in fact enjoy a university presence long before. The collegiate School of Business at Wharton, University of Pennsylvania, was established in 1881 and was offering its first courses in product marketing in 1904”. Egan (2008, p.7) believed:

The 1950s represented a watershed for marketing thought as the mainstream debate became steeped in science. This science-led revolution reflected a conscious movement in US business thinking. In the early 1950s the *Ford Foundation* started an initiative to infuse scientific theory into US business systems and marketers were quick to get involved. US Business Schools responded by raising admission standards and including more mathematics, statistics, economics and other sciences to the curriculum.

2.3 Marketing Concept

Around the same time as these progressions in the marketing studies, developments were being made in relation to the concept of a marketing mix. According to Egan (2008, p.7):

In the early 1950s, Borden (1964) introduced the concept of the marketing mix, a list of 12 variables (product, price, branding, distribution, personal selling, advertising, promotions, packaging, display, servicing, physical handling, fact finding and analysis) from which the marketer could blend the ingredients or variables of the mix into an integrated marketing program.

This model was to allow the marketer the opportunity to vary the mix to give the product the best chance of success. The mix did not need to involve all aspects which in turn led to the creation of the 4Ps marketing mix by McCarthy (Egan, 2008, p. 7-8). According to Egan (2008, p.7-8), the 4Ps was a seminal piece of work and is still in use today. McCarthy “reconstructed Borden’s original 12 variables into the ‘4Ps’ model (Price, Product, Promotion and Place)”. This model was not the only model developed at the time but according to Egan (2008, p. 8) “its inherent simplicity ensured the rise and rise of the model”. McCarthy believed the 4Ps would be an aid to instruction and a starting point to construct a marketing strategy similar to Borden’s marketing mix (Egan, 2008, p. 8).

Many of Borden’s original marketing mix variables are still relevant in today’s marketing communications. According to Keller (2009, p. 141), “marketing communications are the means by which firms attempt to inform, persuade and consumers - directly or indirectly - about the products and brands they sell”. This is the way in which the company is able to speak to the customers. Keller (2009, p. 141) states that there are eight major modes of the marketing communication mix: the first four are mass media types of communications while the latter four are more personal forms of communication. According to Keller (2009, p. 141), the eight types of marketing communications are:

- Advertising
- Sales promotion
- Events and experiences
- Public relations and publicity
- Direct marketing
- Interactive marketing
- Word-of-mouth marketing
- Personal selling

Although there is over half a century between Borden's and Keller's work, they have striking similarities to them which shows the relevance of the initial model proposed by Borden that was then developed into the 4Ps marketing mix by McCarthy.

However, Keller (2009, p. 141) explains the importance of interactive marketing due to changes in the media environment that would not have been relevant for both Borden and McCarthy. Keller (2009, p.141) states:

Traditional advertising media such as TV, radio, magazines and newspapers are losing their grip on consumers. Technology and other factors have profoundly changed when, where and how consumers process communications, and even whether they choose to process them at all. The rapid diffusion of powerful broadband Internet connections, ad-skipping digital video recorders, multi-purpose cell phones and portable music and video players have forced marketers to rethink a number of their traditional practices.

From this statement, it shows the problems that marketers may encounter when they are in the process of communicating their product or brand to the customers due to the changes in marketing. This is similar to the view of Liodice (2010) who believes that "countless events have contributed to the marketing industry's evolution". Liodice (2010) states that numerous events and inventions have impacted the evolution of marketing. More recently the internet and cellphones have changed the way companies interact with their consumers but according to Liodice (2010) social media and viral marketing "have forced brands to let go of their one-way models of communication and embrace feedback from their biggest critics: consumers".

2.4 History of Branding

Branding has been around for generations and was developed as a way of separating one product or service from another. According to Keller (2003) the actual word brand owes its' origin to the Old Norse word *brandr*, which literally means to burn. Livestock, and in particular cattle, were branded by means of burning symbols into their hide as a means of identifying ownership of the animals. According to Blackett (2003, p.15), branding is essentially a phenomenon of the late 19th and early 20th century. This was the result of the industrial revolution of the time and some of the brands that were formed are still in business today. Examples of firms from this time

are Bass beer, Coca-Cola soft drinks, Heinz baked beans, Quaker oats and Shredded Wheat breakfast cereals. The main reason for these companies continued success is down to the practice of offering products that exceed customer's expectations. These brands will have a competitive advantage over rivals due to their perceived expertise in their chosen industry. However, these brands must strive to keep with the times and constantly evolve along with the market to stay successful (Glasure, 2006)

Jones and Slater (2003, p.31) explain that branding gave a company the legal protection afforded to the inventor's patent while ensuring quality and homogeneity for the consumer that stemmed from the need to differentiate products. Modern branding is perhaps only in its infancy as it came into existence roughly in the 1950s. Branding was introduced as a symbol in 1955 by Gardener and Levy and has been developed and expanded upon considerably since then (Levy, 1959). One only has to mention well known global businesses such as Adidas, BMW, Disney, Mc Donalds and Nike and immediately a vast majority of people can conjure up the symbols associated with these brands. Glasure (2006) believes that branding became increasingly popular due to television and the need to drive consumption to the mass market. At this time, branding was product focused rather than customer focused and as such the purpose was to communicate the benefits of the product. According to Klein (2000, p.3), branding changed in the 1980s. The overall objective of branding was evolving and would not involve just singular products as a result. Klein (2000) stated "that successful corporations must primarily produce brands, as opposed to products". Prior to this the main objective of companies was to produce goods for market consumption.

2.5 What is a Brand?

Brands are an extremely important source of information for consumers to help them make their purchase decision (Turley and Moore, 1995). A well-chosen brand name can produce many advantages including reinforcing quality, enhancing brand identity and recall and evoking feelings of trust, security and exclusivity (Turley and Moore, 1995; Aaker, 2002; and Keller, 2003). The definition of a brand varies depending on where one looks for it. A brand encompasses many different aspects such as a name

or symbol and can have both tangible and intangible attributes while the value of a brand is in the promise that the product or service will deliver (Grimaldi, 2003). Jones & Slater (2003, p.32) contend that the definition should be “a brand is a product that provides functional benefits plus added value that some consumers value enough to buy”. This statement concurs with that of Grimaldi (2003) in that a brand is not just a product but also provides value over rivals. Blackett (2003, p.18) has a similar view to this and highlights that successful brands meet the expectations of those who buy them and represent a promise kept. Papasolomu & Vrontis (2006) agree with the definition of a brand and quote Kotler’s (2003) definition of a brand which is seen as the key differentiating device between the goods and services of competitors. Similarly, other authors, such as Jobber (1998) and Doyle (1994) also emphasize the potential of a brand to differentiate between goods and services. Some authors focus on the differentiated advantages offered by a brand, while other authors focus on distinguishing the product offering from competitors. Philip Kotler (2000, p.285) defined branding, in an uncomplicated and concise fashion. He sees branding as, “A name, term, symbol, or a combination of them, which is intended to signify the goods or services of one seller or group of sellers and to differentiate them from those of competitors”. This definition is almost a carbon copy of the one used by the American Marketing Association since 1960 as cited in Keller (2003). De Chernatony and McDonald (1992, p.18) provide a comprehensive definition of a brand. They state:

A successful brand is an identifiable product, service, person, place, augmented in such a way that the buyer or user perceives relevant unique added values which match their needs most closely. Furthermore its success results from being able to sustain these added values in the face of competition.

Through the above definition, deChernatony and McDonald (1992) capture the physical and psychological aspects of a brand and also take account of the competitive external environment of branding.

According to Blackett (2003, p.2), “the brand is the most important and sustainable asset of any organisation...and it should be the central organising principle behind every decision and every action”. This point highlights the need for a brand to be developed for companies that wish to be at the forefront of a sector. This is noticeable

in today's culture where a brand is not necessarily a company anymore. Blackett (2003, p.20) and Grimaldi (2003) both agree that a brand has moved beyond companies and into many different facets of the community. Both authors use examples to illustrate this point. Currently brands may be football teams, pop stars, celebrities, universities and there is even potentially for a person to become a brand in their career.

This brings us on to another point; although brands are important in business it is important to remember that brands cannot be all things to all people (Jones & Slater, 2003, p.32). This has many implications for a company. If the company tries to do this, they may struggle to compete successfully in the market. A company should aim to target a specific segment of the market and aim to be the leader of that sector. Once successful in this sector, they will then have the brand recognition, knowledge and finance to expand their business.

2.6 Building a Brand

Brands are important aspects of a company but how long does it take to build a brand? The answer will vary depending on each company and the products they offer. Grimaldi (2003) states that "it takes as much time to build a brand as it takes a person to build a reputation". This highlights how long and difficult it can be to create a positive brand as it requires the company to be constantly evolving while being "focused, determined, and consistent everywhere, every time". As a result, brands become increasingly important for companies. So much so that companies merge and purchase other business just to acquire the brand name (Blackett, 2003, p.19). This is more widespread in recent times due to the durability of brands and their earning potential. Sometimes it is more cost efficient for a large corporation to purchase a successful brand than to develop a brand to challenge that competitor. It allows the corporation to adopt the recently acquired brand while also increasing their customer base. Blackett (2003) gives various recent examples of this to illustrate the point. Blackett (2003) explains that 'the durability of brands, the quality of their earning power (unlike short-lived technology assets such as patents) and their widespread appeal make them highly desirable properties'. The author uses Unilever's purchase

of Bestfoods for \$21 billion is a perfect example of this. Blackett (2003) explains that due to the globalization of trade, that larger companies may be able to take advantage of famous food brands. With brands that have true global potential, they are more likely to be tapped by a company the size and scale of Unilever rather than Bestfoods as the company lacks Unilever's global resources.

Once a brand has been in existence for a sustained period of time it will have high brand equity (Papasolomu & Vrontis, 2006). This allows companies to have brand loyalty, name awareness and perceived quality. Papasolomu & Vrontis (2009) agree with previous authors that a brand is a valuable asset and can therefore be bought or sold. The reputation and integrity of a brand is extremely important and cannot be underestimated. Blackett (2003) is an advocate of this and highlights the problems Coca Cola encountered in the late 1990s as a result of an inattention to consumers needs. Blackett (2003) goes on to explain how Coke was forced to withdraw from the Belgian market following a contamination scare. Despite dealing with the scare quickly and efficiently, it attracted a great deal of attention. Blackett (2003) continues to state that at the same time Coca Cola was "involved variously in a discriminatory employment suit, an antitrust investigation in France and a failed attempt to buy the soft drink brand Orangina". This resulted in analysts and investors to question the grip that the company had on its business. As a result, the share price fell and a planned acquisition of Quaker was abandoned. Blackett (2003) echoes Grimaldi's (2003) view that reputations and brands have to be managed very carefully and can easily fall foul of the consumers and investors if they do not act properly. This can have a substantial impact on business which can be detrimental to the company in the long term (Blackett, 2003).

2.7 Brand Awareness

There are a variety of different definitions of what brand awareness is. Aaker (2002, p.10) states that brand "awareness refers to the strength of a brand's presence in the consumers mind" while Radder & Huang (2008) believe that "brand awareness is the consumer's ability to identify a brand under different conditions". Esch et al (2006) consider that brand awareness as the strength of the brand node in memory. From the

above authors it can be assumed that brand awareness refers to the strength of the brand in the consumers mind and how easily the consumer can remember it in different situations. According to Radder & Huang (2008) “brand awareness is created and enhanced by increasing the familiarity of the brand through repeated exposure”. As such the more a consumer sees of the brand, mostly through advertising and purchase of the brand’s products, it will lead to a higher level of awareness of the brand.

When a company is looking to create a brand they must strive to create an awareness of the brand among consumers in the market. Esch, Langner, Schmitt & Geus (2006) believe that for a company to successfully manage a brand, then establishing brand awareness and image should be a key objective for the company. A good quality product should be a priority and will therefore create awareness of the overall brand. Esch et al (2006) echo the views of Macdonald & Sharp (2000) who state that:

It has long been held that one of the major goals of marketing is to generate and maintain brand awareness, this is seen as particularly important in low-involvement situations where consumers may engage in little active search for information to aid choice.

This point has more relevance to the aspects of branding and the sportswear market that will be investigated by this study.

Radder & Huang (2008) also highlight the importance of creating brand awareness for a company when they say “creating and building brand awareness, reaching consumers' minds, and encouraging them to develop a preference for the brand, are important steps in ensuring a successful product brand”. This is a constant process for a company that keeps them at the front of the consumer’s mind. This is similar to the thoughts of Ross & Harradine (2004) who believe that “awareness is the crucial first stage of the buyer readiness in order to encourage a customer to develop a preference and thus move closer to the point of purchase”. Both authors stress the need to create a preference for the brand in the customer’s eyes and as such this should be an aim for the company.

According to Aaker (2002, p.10), “awareness is measured according to the different ways in which consumers remember a brand”. As such each consumer may have a different method to remember the brand depending on the level of awareness of the brand. Aaker (2002, p.10), Ross & Harradine (2004) and Radder & Huang (2008) are all in agreement that brand recognition and brand recall are critical in a consumers level of awareness of a brand. Aaker (2002, p.10) adds a few more aspects such as “top of mind” and dominant brands to measure awareness. These latter aspects of awareness refer to the consumer’s knowledge of the first brand they recall or the only brand they recall.

According to Radder & Huang (2008) “brand recognition is particularly important when a consumer choose a brand at the point of purchase”. This assumes prior exposure to the brand which is similar to the view of Aaker (2002, p.10) who believes that “recognition reflects familiarity gained from past exposure”. However a flaw of this kind of recognition is that the consumer may have had a bad experience in relation to the brand which would result in the consumer choosing a rival brand. “Brand recall is considered the next level of brand awareness. It relies on unaided recall and relates to the consumer’s ability to retrieve the brand from memory when provided with a relevant cue” (Radder & Huang, 2008). This follows the view of Ross & Harradine (2004) who consider brand recall to be the ability to retrieve the brand from memory. From this, we can take that brand recall is used by consumers in a variety of ways and not just the mention of the brand name. Brand recall may occur due to hearing a sound, seeing a symbol and so on. Aaker (2002, p.11) gives a slightly different definition of brand recall. He states that a brand has “recall if it comes to consumers’ minds when its product class is mentioned”. This takes into consideration that the brand may not be relevant in relation to certain other brands that are not in their industry or product class. Aaker (2002, p.15) believes that “recall is as important as recognition”.

Aaker (2002, p15) acknowledges that there is an ultimate awareness level for brands. This is known as “brand name dominance where...most customers can only provide the name of a single brand”. This is where consumers instantly recognise that a certain brand is extremely dominant in their product class. Brand awareness is now critical

for companies in a global market and as a result of this companies are trying to make children aware of their brand at a younger age. According to Ross & Harradine (2004) “organisations recognise the value in attracting the very young consumer” and “it is suggested that positive choices can be made before the child reaches the age of five”. Although this may seem strange to certain companies it is essential that companies embrace this as children can be the group that make the brand popular. Ross & Harradine (2004) believe that “the playground remains the prime location for brand awareness to be seen in”. This is also has importance in relation to brand loyalty as once a child has a preference for a specific brand it may result in them being a customer for life.

2.8 Brand Loyalty

Companies want consumers to be loyal to their brand and this is a key consideration for brands to manage. Aaker (2002, p.21) believes that there are two main reasons why brand loyalty is an important aspect and appropriate to include in brand management. These reasons are “a brands value to a firm is largely created by the customer loyalty it commands” and “considering loyalty as an asset encourages and justifies loyalty-building programs which then help to create and enhance brand equity”. According to Bennett & Rundle-Thiele (2005, p.250) “brand loyalty is a measure of the health of the organisation”. This highlights that a company with strong brand loyalty is competitive in the market as the company would offer quality products to the consumer. Brexendorf, Muhlmeier, Tomczak & Eisend (2009) agrees with Bennett & Rundle-Thiele (2005) in relation to the value of brand loyalty. Brexendorf et al (2009) state that:

In highly competitive markets brand loyalty generates numerous benefits like erecting barriers to competitors, generating greater sales and revenues, reducing customer acquisition costs, and inhibiting customers' susceptibility to marketing efforts of competitors.

This is similar to the view of Aaker (2002, p.21) who believes that the retention of the customer is critical for a company as it costs less to retain customers than to attract new customers. Aaker (2002, p.21) acknowledges that many companies make the

mistake of trying to entice new customers to the brand while neglecting existing ones. According to Aaker (2002, p21-22) one of the main reasons for this is that the loyalty of existing customers represents a substantial entry barrier to competitors due to the expensive cost of enticing customers to change loyalties which is akin to the view of Brexendorf et al (2009). Jensen & Hansen (2006) believe that the “firms with large groups of loyal customers have been shown to have large market shares”. This is important as those firms with large market shares will most likely have larger sales revenues than the competition. As such the creation of brand loyalty can be critical to a brand. When looking at brand loyalty it is important to acknowledge that “all different areas of a customer’s contact with the brand provide an opportunity for creating a favourable attitude and enhancing loyalty to the brand” (Brexendorf et al, 2009). It is therefore important that all company employees realise this and they can play a crucial role in the experience of the customer and their evaluation of the brand. Brexendorf et al (2009) believe that the front line salesperson interactions with the customers will impact the customer’s perception of the brand and that the salesperson can represent and define the brand for the customer. The reason for this is that the salesperson may be the only person they come into contact with when purchasing a product. According to Shukla (2009) it is important to attract young adults to the brand as they will develop behavioural patterns linked to the brand and possibly become a customer for life. As a result of the importance of brand loyalty, many companies implement loyalty programs in order to enhance loyalty among customers. Aaker (2002, p.23-24) notes that companies try to enhance loyalty by using frequent buyer programs and customer clubs. By using these programs, companies can monitor customers and track their purchasing behaviour through database marketing. This can also allow firms to further segment their target markets and match products to customers that will enable the firm to create higher levels of loyalty among customers.

2.9 Small and Medium Enterprises

Steenkamp and Kashyap (2010, p. 372) state that “the concept of small business is typically interpreted in terms of small and medium enterprises (SME)”. Steenkamp and Kashyap (2010, p.372) continue to say that “SMEs, constitute a diverse and dynamic group of enterprises and the firm size is measured in a variety of ways...the

diverse structures of economies make a single statistical definition impractical”. However, according to Hauser (2005, p. 2), small and medium enterprises are currently defined by their size. Hauser (2005, p. 2) goes on to state that:

In the European Union SMEs are defined in the Commission Recommendation of May 6, 2003. Concerning to this recommendation an enterprise is regarded as small or medium sized if it has:

- not more than 250 employees and
- not more than 50 Million Euro turnover resp. a balance sheet total of less than 43 Million Euro
- and if not more than 25% of the shares of such an enterprise are in ownership of another enterprise.

This definition is relevant to the Irish market due to the number of SMEs that operate within the country. According to the Tax Strategy Group (2006, p. 1), Ireland has approximately two million people in employment and of these 350,000 work for Government departments, state agencies or other public sector bodies and over 100,000 work in agriculture. The Tax Strategy Group (2006, p. 1) continues by stating that the rest work in the enterprise sector. According to Hauser (2005, p.2-3), “the population of enterprises can be divided into three groups”:

- Enterprises where the manager is also the owner or a member of the owner family and decides short and long-term issues in the interest of his enterprise. (Type 1 Enterprise)
- Small or medium enterprises where the manager decides the short-term strategic decisions and prepares the long-term decisions, which he puts to the board of owners. If the board of owners consists of private investors they decide in their interest, which usually is the maximisation of their profit and thus profit of the enterprise (Type 2 Enterprise)
- Enterprises belonging to enterprise groups. In this case strategic issues are decided in the interest of the group and in the head quarters of the group. Thus it is possible that profits are not maximised within that enterprise but elsewhere e.g. by setting internal prices deviating from market prices (Type 3 Enterprise)

The Tax Strategy Group (2006, p.1) believes that “about 777,000 people work in businesses that employ fewer than 50 people. Given the size of the sector, it is clear

that the success of the SME sector is a vital determinant of wellbeing of the whole country. Hashim (2009, p. 126) believes that even though “SMEs have little ability to influence the wider environment and their activities are usually dictated by the market...SMEs are very important in the economic activities of most nations”.

Hashim (2009, p126) continues to say that:

They constitute more than 90% of businesses and contribute to job opportunities (most new employment) and social cohesion, as well as regional and local development. SMEs are less bureaucratic than large firms, and decisions can be made quickly. They are more responsive to market needs and they have the flexibility to try new approaches.

According to Gilmore, Carson and Grant (2001, p. 6), “it is well documented that SMEs have unique characteristics that differentiate them from conventional marketing in large organisations”. Gilmore et al (2001, p.6) continue by stating that “these characteristics may be determined by the inherent characteristics and behaviours of the entrepreneur or owner/manager; and they may be determined by the inherent size and stage of development of the enterprise”. Gilmore et al (2001, p.6) explain that SMEs may have “limited resources, lack of specialist expertise and limited impact in the marketplace”. This is similar to the view Gilmore, Carson, Grant, O’Donnell, Laney and Pickett (2006, p. 21). Due to these limitations, SME marketing is often simplistic and done in a haphazard and informal way that is often responsive and reactive to competitor activity rather than proactive. As a result, SME marketing is often described as flexible, informal, unstructured and short term orientated (Gilmore et al 2001, p. 6; Gilmore et al 2006, p. 21)

2.10 SMEs and the Internet

“Early use of the Internet by SMEs was driven by a combination of management enthusiasm and the need for improved communication” (Jeffcoate, Chappell and Feindt, 2002, p. 124). Jeffcoate, Chappell and Feindt (2002, p. 124) state that:

Most participants believed that it provided a cheap way of accessing the global marketplace, prior to setting up serious business relationships. They believed that not having an Internet presence would soon become a competitive disadvantage.

From this statement, it is noticeable that the potential of a global presence would be important to SMEs to improve their presence. According to Tetteh and Burn (2001, p. 171) “web-based business can be an extremely attractive option for most SMEs to extend their customer base into a global market without vast expense”. This will result in an increase in potential customers that can get access to companies’ products. Tetteh and Burn (2001, p. 171) believe that “SMEs can achieve global competitiveness without necessarily increasing their actual size, but rather by building on their virtual or soft assets in order to expand”. While the Internet is an advantage to SMEs, Hashim (2005, p. 127) believes that many SMEs do not use the Internet to gain maximum exposure. Hashim (2005, p.127) continues to say that “many SMEs use e-mail and have websites, but very few engage in more complex integration, such as online sales and supply chain management”. This indicates that there is scope for SMEs to further their reach in the global market by increased use of the Internet in the running of their business.

2.11 The Sportswear Industry

According to Clean Clothes (2004, p. 5-6), “in the 1970s, athletic sportswear began to evolve from a product line aimed at small and unique markets into mainstream fashion product”. This resulted in sportswear becoming more popular in the 1980s and moving into the mainstream clothing market but it was also accompanied by an increase in sports participation (Clean Clothes, p.6). According to Alibaba.com (2007, p. 4), “with the concept of sports and exercises being more readily accepted...Sportswear in the 21st century will be a combination of function and fashion”. This is a view similar to that of Clean Clothes (2004, p. 6) which states that “most athletic footwear (around 70%) is bought for leisure, casual or every day use. In the United Kingdom (UK), one report estimates, only 20% of sportswear is bought for actual sport or exercise”. This will impact the sportswear companies and potentially the types of products produced.

2.12 The Sportswear Market

According to Clean Clothes (2004, p.6), “the total worth of the athletic apparel market is estimated at over 58 billion US dollars - of which the sportswear apparel sector forms a much larger part than the athletic footwear sector”. Clean Clothes (2004, p. 6-8) state that the international athletic apparel market is worth nearly 41.5 billion dollars at wholesale level while the athletic footwear market is worth 17.012 billion dollars wholesale. However this may be increased to 25 billion dollars at retail level. Following on from this, Clean Clothes (2004, p.6-8) state the US sporting goods market is the world’s largest with 41% of total sales followed by the European Union with 38% of total sales in the athletic apparel market. This is similar to the athletic footwear market which is lead by the US with 47% of the world’s total sales followed by the European Union with 31%.

Despite the size of the global sportswear market, there “is the dominance of the market by only three core brands – these being Nike, Adidas and Reebok” (just-style, 2005). Just-style (2005) indicates that these three brands account for 29 per cent of the total market for sportswear. Clean Clothes (2004, p. 10) have a similar view to just-style and state the “in the US, 70% of the market is controlled by Nike, Reebok and Adidas”. According to Wikinvest¹ (2010), Nike is the largest manufacturer of athletic footwear and apparel worldwide by sales. It states that its revenue for 2009 fiscal year was 19.2 billion dollars with 34% of its revenue coming from the United States and 29% of its revenue coming from Europe, the Middle East, Africa (EMEA). According to Wikinvest² (2010), “Adidas Group, the parent company of adidas, Reebok and TaylorMade Golf, is the second largest maker of athletic footwear, apparel and equipment by sales (2009) after Nike”. Unlike Nike, Adidas have a larger proportion of their sales in Europe, which accounted for 42% of Adidas earnings in 2009 while only 22.7% of their sales came from North America (Wikinvest², 2010).

“Below the three top names in the market are a multitude of brands – some of the best known being brands such as Puma and Head – which continuously strive to be the best of the rest” (just-style, 2005). In the apparel market it is estimated that Fila, Puma and Umbro each have 1% of the market share while Mizuno represents roughly 0.5%

with Lotto, Kappa and New Balance represent less than 0.5% of the market share (Clean Clothes, 2004, p. 7). While in the footwear market, “Asics, Fila, Kappa, Lotto, Mizuno, New Balance, Puma and Umbro each comprise somewhere between 1% and 8% of the total global athletic footwear market. Together, however, they comprise some 24% of the world market” (Clean Clothes, 2004, p. 10). This highlights that despite the dominance of Nike Adidas and Reebok, there is potential for the smaller companies to compete successfully.

Within the Irish market, according to InterTradeIreland (2000, p.1), “the retail clothing market in Ireland was worth IR£3.4bn in 1999...and has grown by 59% since 1995”. This shows a huge growth in the market which has almost doubled in size. According to InterTradeIreland (2000, p.1), “the high growth in the clothing market can be explained by the increasing amounts of imports (+45% in 5 years) coupled with the UK multiples continued expansion in the Irish market”. This has led to it becoming increasingly difficult to define an Irish look (InterTradeIreland, 2000, p. 1). InterTradeIreland (2000, p. 7) state that “an increasing number of Irish customers in all segments of the market are becoming increasingly brand conscious” and this is present in the sportswear segment which has seen an increase in the presence of designer brands. In the menswear’s segment, “sportswear brands such as Nike, Adidas and Reebok represent a dominant force in young fashion” (InterTradeIreland, 2000, p. 9). While in the footwear market, new segments have emerged within the trainer market such as sportswear (InterTradeIreland, 2000, p. 10).

From examining O’Neill’s most recent financial statements (Appendix A), it is noticeable that the company have increased their net worth from 13.8 million euro in 2007 to 14.5 million euro in 2008. However there was a drop in their gross profit for 2008. In 2008, gross profit was down to just over 10 million euro from 10.3 million euro in 2007. This represent a decrease in the companies retained profit for the year. The retained profit for 2008 was 623,060 euro which was down from 730,592 euro in 2007.

2.13 Sportswear Branding

According to Dawes (2009, p. 451) “sportswear has grown from an athletes-only niche market to become part of mainstream fashion” which has resulted in certain brands becoming iconic. As a result, sportswear branding is now more prevalent due to the number of competitors in the market so it is essential that the company is able to stand out from the crowd. According to Tong & Hawley (2009) “the active sportswear and athletic footwear product group is one of the most heavily branded areas in the global apparel market”. It is widely recognised that the largest sportswear brands in the market are Nike, Adidas and Reebok in the sportswear and footwear market (Tong & Hawley, 2009; Wikinvest¹ 2010). Ind (2006) gives the example of how Quiksilver connect with their customers by recruiting people from the sports it serves. This gives the employees an insight into the culture of the people who will be buying their products. Moutinho, Dionisio & Leal (2007) believe that when people take part in a sport or wear a specific brand they feel like they belong to a specific group. Moutinho et al (2007) state that people become attached to certain brands as “...membership tends to make them feel at ease by being with like-minded others. Thus, one of the most important characteristics of cults and cult brands is that they establish the differences that link the users”. Moutinho et al (2007) view is similar to that of Ind (2006) who determined that people who are involved in the sport have a better understanding of the brand and what it can offer to the consumer.

When it comes to sportswear branding, it is important to understand the influence of successful sports stars have on consumers. According to Tong & Hawley (2009) “customers purchasing choices are frequently determined by the sports figure they admire, or the teams they follow, and the brands that they aspire to wear”. Due to this, sportswear companies strived to have the most successful of sports stars endorse their products in order to attract potential customers to the brand. Having a celebrity associated with a product gives it the ability to attain prestige or status, which might otherwise not be a simple task. Simply using a celebrity’s name, photograph or even a voice, which is instantly recognisable, can create the association. Sports figures are particularly effective as endorsers because fans identify very closely with them, and when a sports star lends support to a brand, fans become brand customers as they

identify with both the endorser and the product (Irwin, Sutton, & McCarthy, 2002).

The three goals of celebrity endorsement according to Jowdy and McDonald (2002) are a) generating initial awareness, b) reinforcing the image of the brand and most importantly, c) influencing purchase intentions. The use of celebrity endorsement is primarily designed to help advertisers in grabbing the attention of consumers. Endorsements may also help marketers by creating the advertisement to stand out from the competition, thereby helping the process of communication to the customer. Sometimes a celebrity may be used in designing a new product around the personality as this tactic can be very rewarding and effective if implemented correctly as it gives a brand instant character and image. Celebrities may also be a powerful mechanism for foreign market entry. Famous personalities who have global appeal can help companies break down many cultural roadblocks, such as language or relationships, according to Erdogan (1999).

Very few sports personalities appeal to everyone on a global scale, and even fewer generate the high levels of positive buzz that brands want to link with (Brand Strategy, 2008). However marketers must be cautious that the celebrity doesn't overshadow the brand, through a process called the vampire effect. Erdogan (1999) comments on the vampire effect, which unfolds when the celebrity overshadows the brand. One must also be cautious when selecting potential endorsers, to ensure they are not likely to become involved in negative publicity. Paying a celebrity to endorse your product is a risky prospect at the best of times. Sporting stars can pick up injuries, lose form, or worst of all, be banned for using drugs. Celebrity misbehaviour is a frequent occurrence. Celebrities such as OJ Simpson, Mike Tyson and Michael Jackson have caused significant damage to the reputation of the brands, which they endorsed due to controversies with which they became involved. Indeed celebrity controversy was evident too in this country prior to the 2002 Soccer World Cup in Japan and Korea. Roy Keane caused significant negative publicity for Soft Drinks Company 7up when he returned home in controversial circumstances before the event commenced.

Another issue for marketers is when celebrities become multiple endorsers for many diverse products or services. Keller (2003) gives the example of pop star Britney Spears who in the space of a single year appeared in advertisements and promotions for eighth different products and services. Mowen and Brown (1981) after careful analysis concluded that if a celebrity's image is linked to many brands, the impact and image with each product is likely to decrease since the relationship between the celebrity and one of the brands is not significant or unique.

Dawes (2009, p.452) believes that the sportswear brand is unique due to this emotional attachment to certain athletes and brands. As a result of this, "sportswear and sportswear brands are argued to be consumed, at least in part, for symbolic and emblematic purposes". A consequence of this is that consumers will have high levels of loyalty to sportswear brands which may represent a unique market for sportswear companies. Dawes (2009, 452) believes that normal patterns of customer loyalty, switching and brand performance may not be exhibited by consumers. Therefore, this would give the dominant brands a competitive advantage in the market. Dawes (2009, 451) also goes on to state that "brands share customers with other brands", which would mean that customers may have a preferred brand but does not prevent them from purchasing a rival brand i.e. Nike/Adidas. Both brands compete in the same market but consumers may purchase products from both companies. Ideally a sportswear company would like to develop a significant brand loyalty so that a customer is a core customer of their brand and may potentially use other competing brands. Tong & Hawley (2009) believes that "building brand equity is crucial for a heavily branded product category, like sportswear".

2.14 Effects of Recession

When a recession hits an economy it is essential that the companies in the affected region adopt strategies that allow them to survive the slowdown and hopefully emerge from it with a stronger and loyal customer base. According to Crosby (2009, p.8) "there are many risks of making a false step, where a short-term move could result in long-term disaster" for a company. This may be the result of companies trying to reduce costs while not realising the importance of the customers. This is a similar

view to that of Gulati, Nohria & Wohlgezongen (2010, p.63) who believe that “CEOs...are so busy tackling short-term priorities that the future is obscured”. Crosby (2009, p.8) believes that companies need to stand behind the long term value of customer relationships. The main reasoning for this is that “customer loyalty is a prized intangible asset that once squandered is not easily regained”. Companies spend a large amount trying to obtain customer loyalty during boom periods that it is unfortunate that it can be lost so easily in a recession. The company should do everything it can to retain customers without devaluing the overall brand.

It is believed that companies can build brands easier during a recession due to reduced costs. Roberts (1998) believes that “building brands during a recession is easier because competitors will be cutting costs”. Roberts (1998) has a similar view to that of Crosby (2009) and Gulati et al (2010) when he says that “short-sighted cuts to marketing investment only open the door for competitors with a longer vision to take up your market share”. All authors advocate a long term vision and strategy when in a recession. Roberts (1998) proceeds to mention that building brands during a recession can be very cheap due to media cutting costs which creates value for the company. This concurs with view of Strategic Direction (2009) who believes the marketers should take on available advertising slots on the cheap. If the advertisements are effective then such companies will be rewarded by increased attention from consumers and potentially extra sales when the economy emerges from the recession.

When looking at the effect of a recession it is important to realise the importance of consumer behaviour. According to Bohlen, Carlotti & Mihas (2010) consumers “are now learning to live without expensive products”. Flatters & Willmott (2009, p.109) believe that consumers have “no choice but to be thrifty”. However, this is not just a feature of people who may have lost out during the recession but “many affluent consumers are economizing as well, even though they do not always have to”. This is a new phenomenon in the market place and as a result consumers may not stay loyal to a specific brand or product. This is a result of the emergence of the online social networks (Flatters & Willmott, 2009, p110) and that consumers “could constantly find a profusion of brands or products to meet their needs”. In such times, consumers are essentially able to pick and choose the products they want to purchase. Bohlen et al

(2010) concur with Flatters & Willmott (2009) when they say that “in a recession, though, consumers are less willing to pay more” for a product and they believe that this will remain the same when the economy emerges from the recession so companies must adapt to this.

2.15 Conclusion

The role of branding has become more prevalent in the market place in recent times and can be complex issue for a company. A strong brand is developed overtime and is often a result of sustained success in the market. It is important to note that the themes that run through this section are that building a brand takes time and can be affected by various issues that the company can encounter both positive and negative; brand awareness varies depending on the individuals knowledge and experience of the specific brand; brand loyalty is a sign of strength of the company; companies use celebrity endorsers to help create associations of success attributed to the brand but can have a negative effect if the wrong endorser is selected.

The purpose of the research is to see if these branding strategies are attributable to Irish sportswear companies. The research will try to determine if these strategies have a positive impact on Irish sportswear companies and how they can improve their brand in the market and how customers perceive the brands.

Chapter Three - Research Methodology

3.1 Introduction

In this research project, the researcher used both primary sources and secondary sources to obtain the necessary data. Secondary data involves an extensive review of available literature, books, websites and newspapers articles. Discussed in chapter one are the research objectives, in order to solve these objectives the author selected two collection methods to solve the overall research problem. These methods of gathering the information use a mix of both a quantitative and qualitative approach. The methods include two in-depth interviews with a sales development manager and marketing manager of the selected companies and a survey of the public. With the use of interviews and survey, the researcher found this the best way to obtain the relevant information needed to complete the study.

3.2 Choice of Research Approach

According to The Oxford Encyclopaedic English Dictionary cited by Walliman (2001) 'research' is defined as the systematic investigation into the study of materials, sources etc. in order to establish facts and reach new conclusions. In this study, data was collected from two approaches known as qualitative and quantitative research. Quantitative and qualitative research has different characteristics and also different techniques for analysis. The quantitative method contains instrument based questions to obtain statistical data, performance data, observational data or census data. The qualitative method contains narrative research such as in-depth interviews, open-ended questions, document data, themes, patterns and interpretations (Creswell, 2009).

3.3 Qualitative Research

Qualitative research is a way of discovering and understanding social and cultural phenomena. Qualitative research seeks depth rather than breadth. Qualitative research

looks into a particular topic or subject to get an in-depth and intimate understanding of a small sample group. This type of research does not form a large representation of the entire population. The aim of qualitative research is to get an understanding about how and why people behave and think the way they do.

One piece of information to note about qualitative research is that, it frequently falls within the context of discovery rather than verification. Qualitative research is not guided by traditional ideas nor is it driven by questions from previous literature. The qualitative methods of research that are carried out are known to include open-ended questionnaires, in-depth interviews, ethnographic studies and participant observation (Ambert et al, 1995).

Qualitative research has a number of different features to quantitative research, they are as follows:

- Qualitative data is collected in a spontaneous and open-ended way; these methods have far less structure and control than quantitative methods.
- Researchers that use quantitative methods usually see qualitative research as a threat to the reliability and validity of a study.
- The quantitative researcher begins with a hypothesis for testing, then they observe and collect the data, statistically analyses it and draws conclusions.
- Qualitative research is a lot less structured and more open to changes, for example the research direction or the type of participants in the research. The research may change what is being observed based on changes that may occur in the field setting.
- One important aspect of qualitative research is the coding of data. Researchers use narrative records that will assist coding at a later stage.

(Jackson, 2009, p. 87)

Qualitative research has its advantages and disadvantages which have been explained in detail by Eldabi et al (2002). The advantages are as follows: qualitative research allows the researcher to uncover true feelings and opinions. It is very flexible and can be adapted to a certain situation that may present itself. The type of questioning is open-ended and very in-depth, this allows the researcher to dig deeper on interesting

and relevant issues. Qualitative research researches people in a more natural surrounding, its approach is very conversational. The research also emphasises meanings and interpretations of the respondents.

The disadvantages are as follows; the collection and analysis of data is very time consuming due to the many types of data being collected. The amount of data that needs to be collected may overwhelm the researcher and disrupt the data analysis. With the large collection of data there is a concern that useless and meaningless information may be obtained. Bryman (1993) cited in Eldabi et al (2002) has highlighted a number of issues regarding the use of qualitative research. Firstly, the inability of the researcher to interpret events from the subject's point of view is questioned. Second, the relationship between theory and research can be weak as qualitative research approaches are criticised for not instilling theoretical elements.

3.4 Quantitative Research

Quantitative research typically has a logical and linear structure. Quantitative research places a lot of emphasis on methodology, procedure and statistical measures of validity. Quantitative research methods also rely on the measurement and analysis of statistical data, to determine relationships between one set of data and another (Eldabi et al, 2002). An advantage of quantitative research is that the researcher is separate from the respondent which is in contrast to qualitative research. The sample chosen is a representation of the entire population in that, it can be assumed that what has been gathered regarding respondents opinions can be applied to the total population.

For the purpose of the research question, it was necessary to pursue a blend of qualitative and quantitative research. The research conducted is largely made up of qualitative research methods with quantitative methods used in order to explore the opinions of a larger group. Qualitative research is the most appropriate method for this particular research because the researcher had to get in-depth views and opinions from both organisations. However, the quantitative research was necessary to explore the opinions of the public in relation to the organisations.

Researchers have questioned the reliability of only using quantitative research as it cannot address questions of understanding and meaning (Amaratunga, 2002). Studies have been carried out that suggest that quantitative research is more common in marketing journals than any other type of research (Hanson and Grimmer, 2007). For the purposes of this research, both quantitative and qualitative methods are used. Mixing both types of research methods will eliminate limitations of both types of research in order to strengthen the study.

In chapter two a literature review was carried out. This literature review was the secondary research needed for the purpose of this research project. Secondary data is all data previously published about the research topic (Saunders, Lewis and Thornhill, 2003, p. 188). The sources that were reviewed for this research project were academic books, journals such as Emerald and Business Source Premier, reports, articles, websites, magazines and newspapers. The review of the available secondary data equipped the researcher to obtain a better understanding of the subject under investigation. Primary data is original information collected by the researcher (Saunders, Lewis and Thornhill, 2003, p. 188).

3.5 Research Process

For the purpose of this research, data was needed from the marketing departments of the selected companies and the public. It was decided, that the best way to get as much information as possible would be to hold in-depth interviews with the sales development manager and marketing manager of the selected companies. The researcher also decided to hand out a survey to the public in order to complete the research.

3.5.1 Azzurri

The business was started by John and Miriam Molloy in 1985 as a home enterprise. The company is Irish owned and managed and it employs over 40 people operating out of a facility in Waterford. The company has two separate businesses which are TeamKit Ltd and Waterford Uniforms Ltd. TeamKit Ltd is responsible for the sportswear clothing and was registered in 2001. Azzurri Sport is the primary brand of

TeamKit and became a Gaelic Athletic Association (GAA) Kit and Leisurewear licensee in 2002. This license allows Azzurri to provide the complete GAA product range including GAA approved helmets Sliotars and footballs to clubs, schools, colleges and counties nationwide. In 2009, Azzurri Sport introduced detailed product ranges for rugby, soccer, basketball and hockey. All playing kit is made in Waterford to allow for a highly efficient and flexible service where the aim is to achieve 100% customer satisfaction.

(Azzurri, 2010)

3.5.2 O’Neills

O’Neills Irish International Sports Company was founded by Charles O’Neill in 1918 as a manufacturer of footballs and sliotars. The company is 100% Irish owned and employs over 560 people in Ireland. The company is the largest sportswear manufacturing company in Ireland with manufacturing plants in Tyrone and Dublin. O’Neills is a vertically integrated manufacturing company which allows them to manufacture and design the garments to any requirement to meet short delivery times. In the last forty years the company has expanded considerably and is now a major supplier across a wide range of sports. O’Neills has had to respond to the massive surge in demand for quality Gaelic team wear in recent years. The company aim to produce high quality garments suitable for all sporting and leisure activities. Although initially a producer of GAA products, the company now provide products for a wide range of sports such as soccer, rugby, boxing and basketball.

(O’Neills, 2010)

3.6 In-Depth Interviews

An in-depth interview, also known as a ‘depth’ or ‘one-on-one’ interview represents a formal way in which an interviewer asks a set of predetermined and probing questions usually in a face-to-face setting. In-depth interviews are a great way for the researcher to obtain both attitudinal and behavioural data from the interviewee. A very important aspect of this data collection method is that the interviewer is able to use probing question as a way of retrieving more data on a particular topic. Probing questions are questions that result when an interviewer takes the subject’s initial response to a

question and uses the response as the framework for the next questioning in order to gain a more detailed response. (Domegan and Fleming, 2003, p. 184-185)

There are both advantages and disadvantages of in-depth interviews. The advantages of in-depth interviews are; there is a great degree of flexibility. In-depth interviews enable the researcher to ask questions on a large range of topics. The researcher is able to obtain data about the respondent's activities, behaviours, attitudes, opinions and motivations. In-depth interviews also allow the researcher to incorporate both long and short responses into the results, it is very adjustable. The disadvantages of in-depth interviews are; although they can generate a lot of detailed data, the results can lack the ability to be generalised, reliability and the ability to spot minor discrepancies in the data. There is a very high possibility that the interviewer will be bias that will result from face-to-face interactions. With in-depth interviews sample sizes are small, they can be expensive, gathering statistical data is a problem and they are very time consuming.

Telephone interviews are another form of in-depth interviews and according to Malhotra (1999), involve phoning a respondent and asking them a series of questions similar to the structure of a face-to-face in-depth interview. As with in-depth interviews, there are advantages and disadvantages of telephone interviews. The advantages of telephone interviews are; the low cost of telephone interviews in relation to personal interviews. The travel time and expenses are eliminated. Speed of data collection is greatly improved as telephone interviews are the fastest means of obtaining data from respondents. The disadvantages of telephone interviews are; only a limited amount of specific information is collected. It is very easy for the respondent to terminate the interview. Access to a telephone machine with a loud speaker facility from which to record interviewee's responses may not be easily accessible.

The interviews included open-ended questions. The main reason for choosing open-ended questions is it allows the respondent to answer in their own words. The researcher avoided using closed-ended questions as they would limit the respondent to answers that are pre-determined by the researcher. The open-ended questions allow the respondent to answer freely and also to elaborate on their answer. A disadvantage

of open-ended questions is that they are harder to analyse as the respondents usually give a wide variety of answers.

3.7 Conducting the Interviews

The rationale for the in-depth interviews was to uncover how Irish sportswear companies brand themselves in the market and how they create awareness of their brand. The interviews consisted of open-ended questions which would allow the respondent the chance to elaborate if required. The questions were formed around the research objectives that were set out in chapter one. The interviews were conducted at separate times and also using different formats: one was a face-to-face interview and the other was a telephone interview. Both interviews would contain the same questions (See Appendix B).

The researcher contacted the selected companies before hand to schedule time, date and location. The first sportswear company to get in contact with was O’Neills. This company was selected as it is Irish owned and the largest sportswear manufacturing company in Ireland. The interview was scheduled for the 14th of July at their head office in Dublin. The interview was with Cormac Farrell, the marketing manager for O’Neills. The second company to get in contact was Azzurri. This company was selected as they are an Irish owned and managed company. The interview was scheduled for the 20th of July 2010. This interview took place over the telephone due to the location of the company, Waterford and work constraints of the researcher. The interview was with Jamie Osborne, the sales development manager for Azzurri.

3.8 Survey Design

Surveys are a widely used method of gathering information (Mc Burney, 2001). The researcher wanted to gather information from the public to determine their knowledge and opinions of the selected companies. Surveys were decided as the best method of obtaining this type of information. Surveys allow for simplicity and comparability.

The survey was designed to include the objectives of the research project that were set out in chapter one. The survey included two types of questions; open-ended questions and closed questions. An open-ended question allows the respondent to answer in their own words while a closed question limits the respondents to answers that are determined by the researcher. Both types of questions have their advantages and disadvantages. Open-ended questions allow the respondent to answer freely and also to elaborate on their answer. Open-ended questions are harder to analyse as respondents usually give a wide variety of answers. Closed questions are easier to analyse and there are less off the wall responses. The disadvantage to closed questions is that the researcher may be putting words into the respondent's mouth; the pre-determined responses may not suit every respondent.

For this study, the researcher chose to have a mixed approach to the survey design as it gave the respondents a good mix of open-ended and closed questions (See Appendix D). The researcher wanted to get some opinions and varied responses in order to get a good understanding of what the respondents thought. The flexibility of open-ended questions makes them more useful for small scale studies and the structure of closed questions makes them more suitable for larger studies (Mc Burney, 2001).

3.9 Sampling

Sampling allows the researcher to decrease the amount of data required for collection by considering from a sub group rather than from all cases or elements of the population (Domegan and Fleming, 2003). Sampling gives numerous advantages to the research investigation such as lower cost, increased accuracy of results, greater speed of data collection and availability of population elements (Cooper and Schlinder, 2003). In almost all cases, it is not feasible to survey the entire population. It is suggested that a group is selected from the population and the surveys are handed to them. In order to obtain any reliable and valid results about the population it is very important that the sample be 'like' the population, this is called a representative sample (Jackson, 2009, p. 94). Sampling techniques provide a large variety of ways to reduce the amount of data needed to collect for the study by only considering the

sample group (Saunders, Lewis and Thornhill, 2003, p. 150). The sampling method that was used was non-probability sampling in the form of convenience sampling. Respondents were chosen as they were part of a sports team or because they did not play sports. The researcher decided the number of responses required would be 120; the researcher wanted 80 respondents that played sports and 40 respondents that did not play sports. The researcher chose to hand out surveys to a female Gaelic team, a rugby team and a soccer team in the North West of Ireland as well as the people who did not play sports. This enabled the researcher to obtain 101 responses out of the 120 that was desired at the outset. Of the respondents, 64 were male and 37 were female while 69 of the respondents play sports and the remaining 32 do not.

3.10 Research Ethics

It is important that the researcher always stays ethical in the research that they conduct. Researchers have a responsibility to their respondents and the profession of marketing to uphold ethical standards. In the context of a research project, ethics refers to the appropriateness of your behaviour in relation to the rights of those who are the subject of your work or are affected by it. Wells (1994) cited in Saunders, Lewis and Thornhill (2003, p. 129) defines 'ethics in terms of a code of behaviour appropriate to academics and the conduct of the research'. Before the research began the researcher contacted each organisation in order to get permission to include them in the research project. Also prior to the interviews taking place the researcher contacted the marketing manager of O'Neills and the sales development manager from Azzurri to schedule the interviews that suited their available time. No research began until the organisations had given the go ahead. At the time of each interview the researcher asked permission from each manager that the interview could be recorded. For the full transcript of each interview see Appendix C. When it came to administering the survey, each team was contacted to make sure it was a suitable time and day for this to take place. No surveys were given to the sample population until the management of the teams had read them. For the sample population that did not play sports, a cover letter was included to inform of the objectives of the research and to inform them that all answers would be confidential.

3.11 Limitations of Chosen Methodology

The first limitation that was encountered was the assistance of a sportswear company that the researcher had hoped to interview. Both Azzurri and O'Neills decided to take part in the study. However a third company, Jako, that the researcher got in contact with did not seem interested and remained unresponsive despite numerous phone calls and e-mails.

The second limitation was a result of the non response from the sportswear company. This company had been included in the questions on the survey. As a result, the researcher could not fully examine the perceptions of those surveyed in relation to this brand

The third limitation was that there was a poor spread of companies selected by the researcher. Both companies primarily produced GAA products which would distort the findings of the research.

The fourth limitation was the respondents for the surveys. The researcher handed out the surveys to get them back there and then. In most cases this is what happened. However, a number of the surveys were returned incomplete or not handed back at all.

The fifth limitation was the sample of the population selected for the surveys. The focus was primarily on team sports and did not include athletes that took part in individual sports such as athletics and surfing.

3.12 Conclusion

This chapter has outlined the research methods chosen for this research project. For the purpose of this research project it was decided to use both qualitative and quantitative research methods. The researcher decided to use in-depth interviews with the sportswear company's managers to obtain the bulk of the data. These interviews were constructed around the research objectives. Surveys were then administered by the researcher to a selection of sports teams and a number of people who did not play

sports. The data was collected in this manner so that the researcher would be able to analyse all the data in order to compare and contrast the answers from the managers and also gain an insight into the perceptions of the sample population towards these brands. Ethical issues are confronted by market researchers on a regular basis and it is vital that the researcher remains ethical and unbiased at all times.

Chapter Four - Findings and Analysis

Introduction

This section of the dissertation will look at the findings from the secondary research and the primary research which was obtained from the in-depth interviews and survey. By doing this, the researcher hopes to discover regularities or differences between how the selected sportswear companies are branded in the market and how they approach the branding process. The results will be compared to issues discovered in the secondary research. Following this will be the presentation of the public survey and discussion of these results. This section will look at how the public perceive the selected sportswear companies and the nature of their business in the market. The findings of the research are explained under each objective which were discussed in chapter one. The findings from the interviews conducted were recorded using Microsoft Word (See Appendix C). The findings from the questionnaires were generated using Microsoft Excel; the data was entered into the program. This allowed the researcher to develop tables and graphs that were used to present the necessary results (See Appendix E).

4.1 Objective - to discover how the selected sportswear companies brand their company and products within the Irish market.

Each company will brand themselves to accentuate the positive aspects of their company and products. To achieve this objective the responses from questions one, two and three were analysed from the interviews and also relevant issues from the literature review. The researcher wanted to know how the companies were branded in the current market and if each company had different methods to do this.

The results of the interviews show that both Azzurri and O'Neills tried to brand their companies through the products and service they provide to customers. This is similar to a number of authors such as Blackett (2003), Grimaldi (2003), Jones and Slater (2003) and Papasolomu & Vrontis (2006) who all believe that the product should

provide value to the customer. However, both companies did this in slightly different ways. Jamie Osborne, Azzurri sales development manager explained that the company aimed to provide a wide range of quality Irish products that are customised to meet the needs of each customer individually. This gives a sense of importance to the customer and increases the customer's satisfaction. Jamie goes on to say that customer satisfaction is one of the key measures of success in the company's eyes. Jamie believes that each product is made to ensure maximum comfort and performance. This would follow Blackett's (2003) thinking that meet expectations and represent a promise kept.

Cormac Farrell, O'Neills marketing manager believe that offering unique, innovative and progressive products is the best way to brand the company. An association with these qualities is vital in the current market for the company. This is similar to Kotler's (2000) view that a brand need to differentiate its product from competitors. A factor for O'Neills is the need to produce modern and stylish products that meet the needs of those who use them. O'Neills take this into account via their design process. Similarly to the view of Azzurri, is the importance of offering products that can be adapted and produced to the specific needs of individual customers. This is vital for both companies due to the nature of their operations. They produce and manufacture playing gear for a wide variety of teams throughout Ireland and each team will have different requirements for the products they wish to purchase.

Both Jamie Osborne and Cormac Farrell go on to explain that the teams that wear their playing gear are critical to the brands. The success of these teams is important to keep both brands in the spotlight and represent the brand to the customers. One aspect that has been vital to the growth of both organisations, this is the GAA.

Jamie Osborne explained that the GAA has allowed the company to grow over the last decade greatly. Jamie goes on to state that due to the GAA's presence throughout the country, it has resulted in an increased customer base that has allowed the company to develop improved products and to progress into different sports products. Cormac Farrell stated that the GAA is one of the reasons that O'Neills is what it is today and that O'Neills is synonymous with the GAA. As a result of this connection, the

company has a strong position in the marketplace and helped the company to grow. Cormac Farrell has a similar view of Jamie Osborne in relation to the GAA's presence throughout the country. It increases the customer base and Cormac Farrell adds that GAA supporters are extremely loyal to their teams which results in a group identity.

The key issues in this section in relation to how the companies are branded are that they both try to highlight the benefits of their products while realising that customer satisfaction is critical in such a competitive market. The role sports teams' play is vital to how the brand stays present in the market also. While the importance of the GAA for both companies has been critical for the development of the brands and customer base.

4.2 Objective - how do the selected sportswear companies create awareness of their brand?

To achieve this objective the responses from questions six, seven, ten and eleven were analysed from the interviews and also relevant material from the literature review.

The researcher wanted to know how the selected sportswear companies create awareness of their brand and what the most important medium is for each company in the creation of awareness of the brand.

From the analysis of both interviews, each company aims to use the sports teams that wear their products to create awareness of their brands. Jamie Osborne explained that Azzurri launch each product in relation to its own merits and the benefits of the product. The company try to make the customer aware of the features that are most beneficial to the customer using the hurling helmet safety and comfort features as an example of this. Cormac Farrell of O'Neills stated they use a similar method to create awareness of their products. The company try to create awareness that the products are high quality while being hard wearing and comfortable which is important for sports players. This echoes the view of Esch et al (2006) who believe that a good quality product is a priority for creating brand awareness and is similar to the views of Macdonald and Sharp (2000).

Both interviews highlighted that certain teams helped to create a higher awareness of the brand. This was the result of success, the population and exposure in the media. Jamie Osborne of Azzurri believes that the Waterford hurling team have helped create a higher level of awareness due to them competing in the latter stages of the All Ireland hurling championship. He goes on to explain how the Mayo ladies football team increased the national coverage of the brand due to a refusal to wear a competitors gear for the All Ireland series after they had signed a deal with Azzurri. Cormac Farrell of O'Neills explained that the best teams to create awareness of the brand varied from year to year depending on the success of the team. He explains that Kilkenny's continuing success in hurling creates great awareness of the brand. One aspect that he alludes to is that the counties such as Cork, Dublin and Galway with a larger population and those that are successful in both the football and hurling championship create greater levels of awareness for the brand. This follows the thinking of Radder and Huang (2008) who believe that repeated exposure creates a familiarity with the brand and therefore the more successful teams will help create more awareness for the brands. Brand awareness is critical according Ross and Harradine (2004) who believe that awareness is the first stage that will encourage the customer to develop a preference for the brand.

When discussing the use of celebrity endorsers for their products, both companies have similar philosophies which is not surprising since they are in the same market producing similar products. Both Azzurri and O'Neills believe that the teams that wear their products are the endorsers of their products. Due to the number of sports team that wear their gear, it gives great exposure to the company. Cormac Farrell of O'Neills adds that the more successful the team, the better it is for the company. This is due to the increased exposure of the teams in the media especially in the build up to big games. He explains that when a team reaches the latter stage of the All Ireland Championship that there is a noticeable increase in the sale of merchandise for those counties. This is in line with the views of Tong and Hawley (2009) who believe that customers purchasing choices are often determined by the sports star they admire or the teams they follow and aspire to when the brands their idols wear. Irwin et al (2002) have a similar view that sports figures are effective endorsers as fans identify with them.

Similar to how the teams are the celebrity endorsers of the brand, Jamie Osborne of Azzurri states that the teams are the most vital medium to reach customers and create awareness of the brand. He explains that by sponsoring the teams, the company are ensuring that there is unlimited potential for the products to be seen by potential customers. This is in contrast to the view of Cormac Farrell of O'Neills who believes that television is the best medium to creating awareness of the O'Neills brand. This increases the exposure of the brand and products and people can see what O'Neills is. He goes on to explain the positive effect of a winning captain lifting the All Ireland in O'Neills gear has and how it links the company to a winning team.

The key issues from this are that both Azzurri and O'Neills use sports teams to create awareness of their brands. They both agree that the more successful the team, the more awareness it will create for the brand. As a result, the sports teams are also viewed as the celebrity endorsers of the brands.

4.3 Objective - do these companies try to enhance loyalty to the brand over the competitors?

To achieve this objective the responses from questions four, five, eight and nine of the interviews were used along with the relevant theory from the literature review. The researcher wanted to know whether the selected sportswear companies tried to enhance loyalty over their competitors. To discover this it was required to find out the primary competitors and core customers of both companies.

Both companies compete in the same market and they both acknowledged that they were in competition with each other for customers. Jamie Osborne stated they primarily compete with both O'Neills and Gaelic Gear in the Irish market but also that some of the global brands would also be in the same market. He believes that they have a number of competitors and their progression into the rugby market in the UK has brought more competitors. Cormac Farrell explains that up until 2002, O'Neills were the primary provider of GAA gear. After the GAA opened the market to other sports companies, O'Neills has more competitors than previously. They believe that both Azzurri and Gaelic Gear are their competitors in the Irish market but also that

some of the larger sportswear companies are offering sponsorship deals to individual players and county boards which can be tough to compete against. Both companies have similar ideas about their core customers. Azzurri and O'Neills agree that their primary customers would be the teams that they provide gear for. Jamie Osborne adds that GAA teams are key to the growth of the company. Cormac Farrell goes further with his description of O'Neill's core customers and states that each team they sponsor is a core customer. This is due to the fact that supporters of teams will only purchase products of their own county or team which can result in a wide range of income streams.

In relation to customer loyalty, the companies have slightly conflicting views. Jamie Osborne of Azzurri believes that loyalty is hard to acquire for relatively new companies especially when competing against larger companies. Azzurri aim to garner loyalty by providing top quality products that customer require when they require them and this will be key to creating a bond with them. Jamie Osborne believes that if this is done correctly than it can be the basis for future purchases. Cormac Farrell differs from the opinion of Jamie Osborne. Cormac Farrell believes that loyalty can be hard to get in the current market and that customers may not be loyal to specific brand. However, Cormac Farrell believes that the link with the GAA may mean that some people will hesitate to purchase an alternative brand for their playing gear. This may be the result of O'Neills having a monopoly on the GAA market until 2002 (Mc Mahon and Kehoe, 2003). This monopoly allowed the company to become synonymous with the GAA and is a bond that may stay in place for a long time. Although Cormac Farrell states that loyalty is hard to acquire currently, he believes that loyalty plays a role in the purchase of sporting goods due to a products link to the games the person plays especially if a player is successful using a specific item. This can be a factor in creating loyalty to the brand. This is important to the company as loyalty creates a barrier to entry for other competitors according to Aaker (2002) and Brexendorf et al (2009)

The key issues from this would be that both companies are competing against each other in the Irish market but more specifically in relation to the provision of gear for sports teams. They differ in their view of loyalty in that one believes it can take a long

time to create loyalty while the other believes that loyalty is linked to the games a person plays and their experiences. A customer's loyalty to the brand is important according to Shukla (2009) as if a company can attract young adults to the brand the development of behavioural patterns linked to the brand may result in a customer for life. Also Jensen and Hansen (2006) believe that firms with large groups of loyal customers have been shown to have large market shares.

4.4 Objective - have these companies adapted their strategies as a result of the recession?

To achieve this objective the responses from question twelve of the interviews were used and also issues relevant from the literature review. The researcher wanted to find out if the selected sportswear companies had adapted their strategies as a result of the recession.

Surprisingly, both companies felt they had not been affected by the recession in any major way. This was mostly due to the way in which both companies were operated. Jamie Osborne of Azzurri explained that the recession has had little impact on the company. He explained that this was the result of an efficiently run company that has full control of its production and development of new products. This was a result of being locally owned and managed. One issue he did raise was that companies had to stay relevant and keep up to date with any developments in playing gear.

Cormac Farrell of O'Neills had a similar opinion to that of Jamie Osborne. He explained that due to a strong business strategy that the recession had not affected the company too badly. He believes that if O'Neills stick to their primary aims of unique, innovative and progressive products it will limit any issues they potential may have. Cormac Farrell believes that launching new products is vital to staying relevant in the market. Also he believes the company's vertical operation allows them to control all aspects of the manufacturing process which limits the impact of external factors. The research from the literature review advocates a long term vision and strategy during a recession. Both companies seem to be following this strategy, they are concentrating on producing quality products and trying to stay relevant in relation to product

development. Crosby (2009) highlights that a short term move could lead to long term disaster for a company.

The key issues from this would be that both companies operating procedures have limited the impact of the recession. The lack of a need for external resources and manufacturers has benefited the companies in a time when many Irish businesses have struggled domestically.

4.5 Objective - How do customers perceive the companies?

To achieve this objective the results of the survey were analysed and the main points were extracted from them to discover trends and views of the sample population. The researcher wanted to find out what the sample population knew about the selected sportswear companies and what their products were. The researcher also wanted to find out if the respondents felt the awareness of the selected sportswear companies could be improved.

From the results of the survey, 63% of the respondents were males and the remaining 37% were females. The male majority of respondents were to do with the research looking at selected sportswear companies and the researcher felt that males would have a higher awareness of these companies. However, a female perspective is required to allow the author to gain a thorough insight in the topic and help balance the information received. The survey results highlighted that the majority of respondents feel into two separate age groups. It showed that 44% of those surveyed were in the 25-34 year old age group and second to that group with 37% was the 18-24 year old age group.

When the respondents were asked what brands come to mind when they think of sportswear companies, there was a wide and varied collection of companies. The most popular replies were that of Adidas and Nike with 64 and 68 responses respectively. This is not surprising to the author due to the global popularity of these brands built over many decades. As such the awareness of these sportswear brands is quite high. A selection of other popular sportswear brands emerges if we look past the two major

brands in this sector. A selection of companies such as Canterbury, O'Neills, Puma, Reebok, Rugbytech and Umbro are quite popular with the respondents and represent a wide range of diverse products for the customers. Some of these companies are synonymous with specific sports such as O'Neills with GAA, Rugbytech with rugby and Umbro with football. The remainder of the responses represent a wide range of sportswear companies but have limited impact on the research due to the low percentage of response.

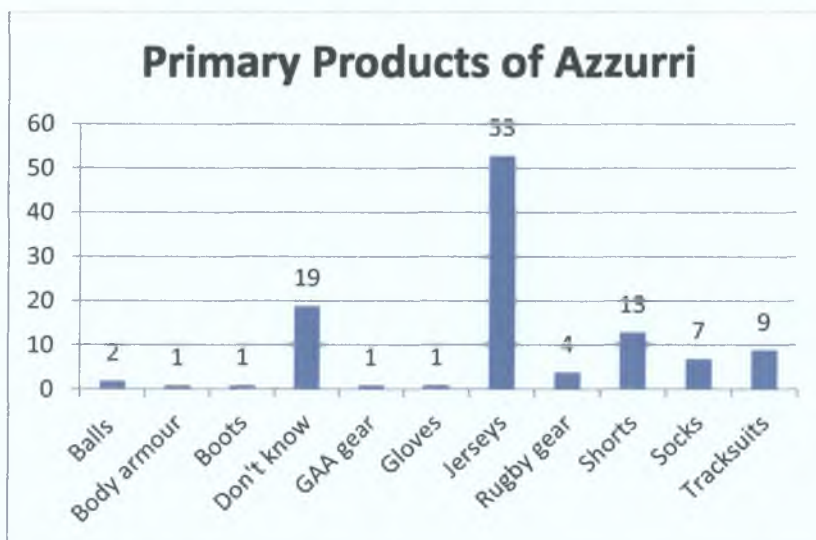
However on further inspection of the responses it is quite clear that there is a poor level of awareness of Irish sportswear companies when sportswear companies are being considered. This is highlighted by the fact that the only Irish sportswear company that comes to respondents' mind without a prompt is O'Neills. Only 12% of those surveyed stated that O'Neills came to mind when they were considering a sportswear company. This would be a slight worry for the Irish companies but would not be so alarming when considered against the size and budget of the global sports brands like Nike and Adidas. When the respondents were asked to name Irish sportswear companies, it gave a better insight into the awareness levels of the population of the companies. O'Neills was the most popular Irish sportswear company among respondents with an 80% awareness level. There were only another four Irish sportswear companies that the respondents were aware of. These were Azzurri with 19%, Rugbytech with 9%, Elverys with 5% and finally Jako with 4%. The lack of awareness of these companies is an issue and especially with the inclusion of Elverys in this section. Elverys are a sportswear retailer rather than a sportswear company. They facilitate the sale of sportswear to the market.

Those surveyed were then asked to state what sport they would associate with the selected sportswear companies. The majority of the respondents, 95%, identified O'Neill's association with the GAA and only a small minority either did not know what sport O'Neills was associated with, 4%, and the remaining 1% associated it with rugby. However, the remaining company did not show the same high level of awareness of their primary sport. Azzurri was associated with the GAA also by the majority of respondents, 66%. This was then followed by respondents that did not

know 18%, football 10%, rugby 5% and hockey with 1%. There is a wider spread of sports here but still the primary sport association is with the GAA.

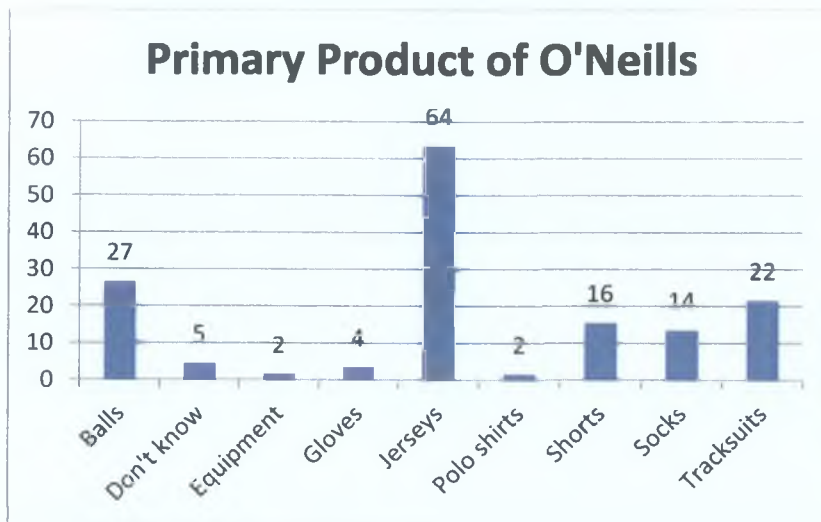
The lack of overall awareness of Irish sportswear company's results in a limited knowledge of their products and what they offer to the market as can be realised by the following results. Each respondent was asked to state what the primary product was of each company to discover if there was a link to specific sportswear or product. The results were varied and highlighted variations between what products the consumers believed the company's sold. The tables below display the results of those surveyed.

Graph 4.1 Primary Products of Azzurri



From the above table it can be seen that those surveyed had a diverse perceptions of what products Azzurri primarily sold. The most popular association was jerseys with 53 responses. There next four most popular answers are do not know, shorts, tracksuits and socks with 19, 13, 9 and 7 responses respectively. The remaining answers are varied but have low response rates with the remaining six answers having less than five responses.

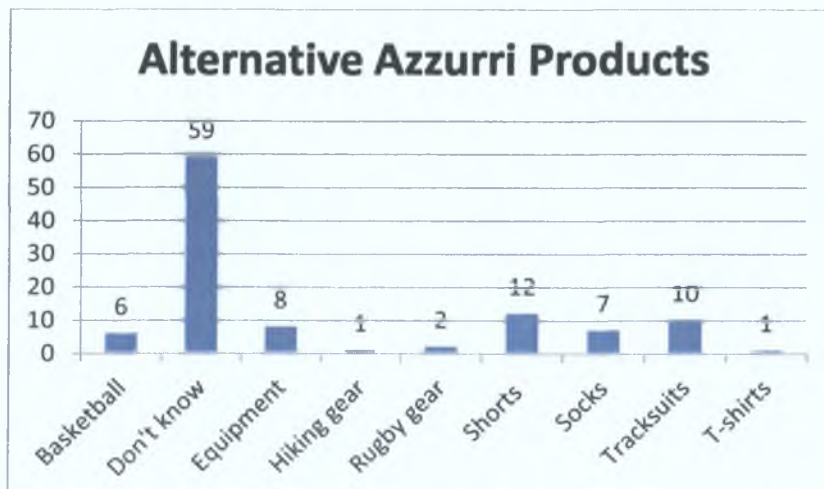
Graph 4.2 Primary Products of O'Neills



From the above table, it is obvious that there is a greater knowledge of O'Neill's products than the previous company. The respondents identified jerseys as O'Neill's primary product with 64 responses. The most popular responses after jerseys were balls, tracksuits, shorts and socks with 27, 22, 16 and 14 responses respectively. The remaining 4 responses were quite low with fewer than 5 responses.

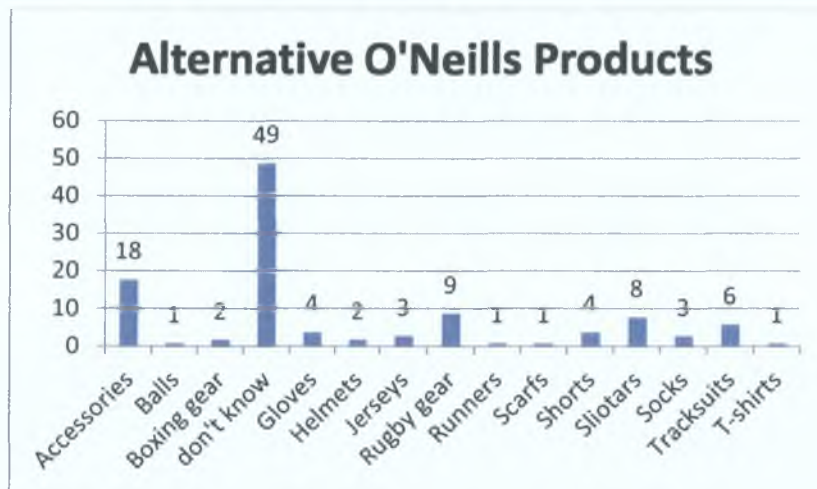
While there was a lot of variations of what those surveyed believed were the primary products of the selected companies, the majority of respondents had quite a good idea of what the companies sold. However, this was not the case when the respondents were asked what other types of sportswear they believed the selected companies sold. The below tables display the results of those surveyed.

Graph 4.3 Alternative Azzurri Products



From the above table, the author notes that there is limited knowledge of Azzurri's alternative products. Of the surveyed, 59 did not know what other products the company sold. This is quite large and there is a large gap to the next most popular response which is shorts followed by tracksuits with 12 and 10 responses respectively. The remaining responses are varied but all have fewer than 10 responses.

Graph 4.4 Alternative Products of O'Neills

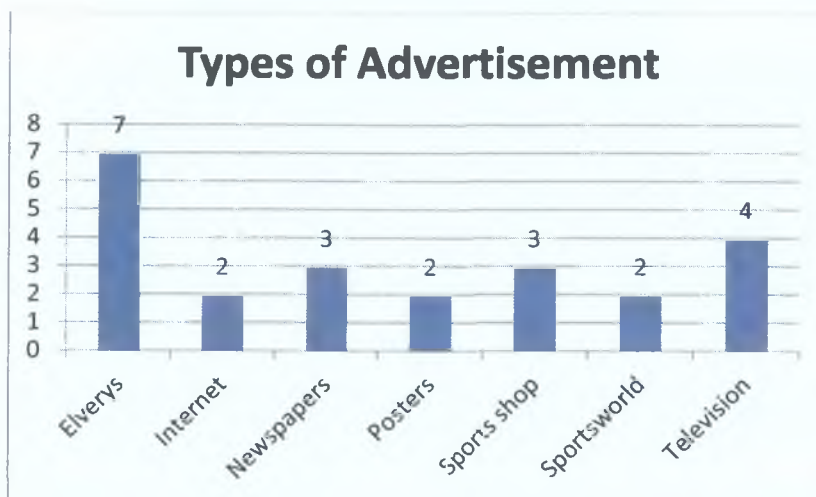


Although O'Neills had a high level of awareness in relation to their primary products, from the above table it is noticeable that the respondents were not able to determine what other products the company offered with 49 responding that they did not know what other products O'Neills sold. Following this was accessories with 18 responses from those surveyed. Although there was a wider range of products recorded, no one product was very popular with the respondents. The remaining thirteen products all had fewer than 10 responses.

Following on from determining what products the respondents associated with the sportswear companies, the next section dealt with whether the respondents had seen advertisements for the sportswear companies anywhere. The vast majority of those surveyed had never seen an advertisement for any of the Irish companies. Of the respondents, 81% had never seen an advertisement for Azzurri and 53% had never seen an advertisement for O'Neills. This is extremely low and would be a concern. Of those respondents that had seen advertisements, there was a limited response with regard to this question. Only 23 respondents actually listed where they had seen an

advertisement for the Irish sportswear companies. The table below shows where the respondents seen advertisements

Graph 4.5 Types of Advertisement



The most common response from those surveyed is Elverys, an Irish sports retailer, with 7 responses followed by television with 4 responses. This means they would be a viable option for future advertisement campaigns for the selected companies.

When asked if Irish sportswear companies did enough to advertise their products in the market, the majority of respondents, 81%, stated that they did not do enough to advertise their products. This was followed by suggestions as to how the Irish sportswear companies could improve their advertising to the general public. The respondents suggested a number of different ways in which the selected companies could improve their advertising. The following were the most popular suggestion from those surveyed and the remaining suggestions can be seen in Appendix E:

	Number of Responses
• More adverts on television and radio	26
• Sponsorship of local clubs	9
• Internet adverts/Facebook	5
• Sponsorship of events - local festivals and competitions	4
• Use of local sports players in adverts	4
• Advertise alternative products to the GAA gear which will increase customers knowledge of products	4
• More advertising in local rather than national media	4

- Advertise direct to sports clubs 3
- Newspapers 3
- Use female sports players to advertise products 3

The respondents were asked if they had purchased any products from the selected Irish sportswear companies with their last ten purchases. The results showed that there were limited purchases of Irish sportswear products. From the results, the researcher notes that 92% of respondents had not purchased Azzurri products and 78% of respondents had not purchased O'Neill's products. This is a low purchase rate for the companies. Those who had purchased products from the selected companies were asked to list what they had bought. The following table shows their purchases.

Graph 4.6 Products Purchased



The opinion of the respondents with regard to the quality of Irish sportswear products was acquired next. The respondents were given a selection of answers to choose from. The most popular response was the products were average quality, 40%. This was followed by fair quality, good quality, high quality and low quality with 28%, 14%, 11% and 7% of the responses respectively. These results show that there is an average opinion of Irish sportswear products with the potential for improvement.

The final question of the survey asked for any other opinions the respondents had with regard to Irish sportswear companies. Those surveyed gave a variety of responses for this question with many quite relevant to the research being carried out by the author.

From the responses given it is evident that there is limited knowledge of what products the companies offer. This can be seen by the following responses:

- Do not give you much of selection
- Knowledge of products is limited
- Lack of female specific products
- Not a great selection of products

This highlights that the public have limited knowledge of the products on offer and needs to be addressed. Many of the respondents felt that the companies should increase the advertising of their products. The respondents commented the companies should try to:

- Advertise their products more effectively
- Create Facebook profiles for the companies
- Increase internet advertising
- Need more advertising
- Use more high profile personalities for advertising

This highlights a need for an increase in the advertising of the products available to the market but the respondents also felt that the companies should not concentrate on their primary products. Those surveyed felt that the companies should:

- Increase female specific gear
- Increase promotion of leisurewear to customers
- Should reach out to other sports areas

The remaining responses can be seen in Appendices but two responses would be a cause for concern for the Irish sportswear companies. These responses were:

- Did not know Azzurri and Jako were Irish companies
- Who are they?

These responses show a lack of knowledge and awareness of the companies from the general public and need to be addressed.

The key issues to take from this section is that the sample population has a good degree of knowledge in relation to the global sports brands but there is limited knowledge of Irish sportswear companies apart from O'Neills. From this it was noticeable that GAA was primary association of both Azzurri and O'Neills and the type of products they offer. Following on from this, the respondents had limited exposure to advertisements from any of the selected sportswear companies which would be a factor in the low level of awareness for Azzurri. Respondents felt there was not enough advertising done by Irish sportswear companies. This lead to a number of suggestions to increase the awareness of the brands within Ireland. Despite respondents believing that the products produced by selected sportswear company were of average to good quality there was a low purchase rate. Finally the results of the final question gave an insight into what the Irish sportswear companies could do to improve the awareness in relation to the public.

4.6 Conclusion

To solve the research problem it was necessary to answer the research objectives that have been highlighted in the research. These research objectives were developed from the literature review and the research question. The findings were generated using various research collection methods as discussed in chapter three, from this the findings were discussed and analysed under each research objective.

The first research objective was reached by using the responses from the interviews with the sales development manager of Azzurri and the marketing manager of O'Neills. The researcher wanted to discover how these companies branded their products in the market and if they differ from one another. It was found that the companies did this by highlighting the benefits of their products and concentrating on customer satisfaction. It also showed that important role of sports teams and the role of the GAA.

The second objective was to discover how these companies created awareness of their brands to customers. The result of this section was that both companies believed the

more successful the team they sponsor, the more awareness that is created and these teams are viewed as celebrity endorsers.

The third research objective was to examine whether these companies tried to enhance loyalty to their particular brand over rivals. It was found that both companies viewed each other as competitors in the market. The companies had differing views in relation to loyalty but both agreed that it was attainable.

The fourth research objective was to examine whether the sportswear companies had to adapt their strategies due to the recession. It was found that both companies were not affected considerably by the recession due to the structure of the organisation.

The fifth and final research objective was to examine to the perceptions of customers in relation to these companies. From the results of the surveys, it was evident that there was limited knowledge and awareness of Irish sportswear companies except for O'Neills. Those surveyed felt the companies could do more to advertise their products.

Chapter Five - Conclusions and Recommendations

5.1 Introduction

The basis of this study was to investigate the brand awareness of selected sportswear companies within the Irish market. The researcher interviewed the sales development manager from Azzurri and the marketing manager from O’Neills and also surveyed one hundred and one people to gain an insight into the brands and the perceptions of potential customers.

In order to achieve the primary research, secondary research needed to be carried out in the form of a literature review on branding and the importance of brand awareness and brand loyalty. The literature review also examined sportswear branding and the effects of a recession on the economy. Research was conducted using qualitative and quantitative research methods which involved the use of in-depth interviews and surveys. From these findings the researcher was able to analyse the primary research and discover any regularities in the findings. The analysis of the interviews and surveys would form the conclusions and recommendations of the research.

It was found from the research that the both companies tried to brand their products around the benefits of each product while ensuring customer satisfaction with every purchase. The companies had similar strategies to create awareness of the brand throughout the teams they provided gear for. The more successful the team, the more awareness created for the company. The companies had different views on the loyalty of customers: Azzurri believed that loyalty is forged over years by providing quality products while O’Neills believed loyalty could be attributed to success in sports wearing a specific company’s product. The impact of the recession limited impact on either company due to the way the companies are run. The perceptions and attitudes of those surveyed is a worry and will be addressed in the recommendations.

5.2 Recommendations

It is recommended by the researcher that further study must be carried out to examine the best way to create awareness of a brand on a larger scale and including extra companies that may not be based in Ireland primarily. The study was satisfactory but the researcher felt that a broader scope that would be inclusive of a variety of sportswear companies would uncover more ways to create awareness of a brand.

From the research carried out, the researcher would suggest that highlighting the products benefits to customers and ensuring their satisfaction is adequate in the current market. However, due to the limited size of the market that both Azzurri and O'Neills compete in, it would suggest that these strategies would not be adequate in a larger more competitive market against global sportswear companies. Azzurri and O'Neills also have an advantage in the market as they are primarily provider of gear to GAA teams. As a result, the majority of the sample population associate them as such but were unable to associate the companies with products that were not GAA related. Azzurri and O'Neills should look to increase their product profile and business scope in the future to increase awareness of the brand and products. Currently both are involved in the provision of playing gear to rugby league teams in the UK. This should increase the awareness of the brand in another country and has the potential to improve sales.

Following on from this, to create awareness of the brands and the products to a wider audience, the researcher would recommend that both companies look into using celebrity endorsers from various other sports. Due to the brands general association with the GAA, many potential customers may have a mental block and see the products as viable only for that specific use. The researcher would recommend that the companies investigate the potential of sponsoring athletes from a variety of different sports such as from athletics which is increasing in popularity due to success of Irish athletes such as David Gillick, Derval O'Rourke and Paul Hession in recent times. Azzurri and O'Neills movement in the rugby market shows the adaptability of their products to other sports and this should be the case with athletics also.

Due to the GAA being seen as male dominated, there seems to be a general opinion the companies produce little to no female specific products. It is recommended by the researcher that the companies increase the advertising of their female product range to the market. This could be done in a variety of ways to allow the companies gain as much awareness as possible. Azzurri and O'Neills could increase their sponsorship of female athletes; advertise more female products and clothing ranges; develop a female product brochure that could be sent out via the post or directly to female sports teams.

From the results of the surveys carried out by the researcher, there is limited exposure to advertisements from Irish sportswear companies in general which is restricting the awareness of the brands to those who are not particularly involved in any sports. The researcher would recommend that both Azzurri and O'Neills look into alternative forms of advertising rather than through teams, television and newspapers. Many companies follow the traditional advertising methods that consumers are used to seeing so to attract the attention of potential customers, Azzurri and O'Neills could use some non traditional advertising methods to increase awareness. For example, they could advertise direct to sports clubs, create product brochures, sponsorship of events such as local festivals and competitions that would increase awareness of the brands.

From analysis of the results of the surveys, the researcher would recommend that any future advertisements would emphasise the "Irishness" of Azzurri and O'Neills products. These companies design, manufacture and produce their own products and it is potentially beneficial to the companies. A selection of those surveyed did not know that these were Irish companies and this could influence the purchase decision on a potential customer.

Following on from the previous recommendation, the researcher would suggest that O'Neills increase the use of their motto "choice of champions" in their advertising to represent the philosophy of the brand. This could be the motto that the company is recognised by in future. From the results of those surveyed, the knowledge of the company's motto is less than 10% which leaves significant room for improvement. In line with this, the researcher would recommend that Azzurri create a tagline or motto

that can be used to help advertise their products and represent what the brand philosophy is. This short statement will give an insight into what the company want to be known for.

5.3 Limitations

The study had a number of limitations that could have made this research project more in-depth. The first limitation was due to the lack of literature available on Irish sportswear companies which affected the secondary research for the literature review.

The next limitation of the study was the selection of sportswear companies. Due to the selection of two GAA companies it resulted in the research being biased to GAA products. This was in part due to the following limitation.

One of the selected companies did respond to the researcher attempts of contact. This lead to a limited view of sportswear companies in the Irish market.

The following limitation was the inclusion of a company that did not return contact with the researcher. However as the surveys were handed out over a sustained period, the company was still included in survey in the hope that they would get in touch with the researcher. This affected the primary research and the final analysis for the researcher.

Another limitation of the study was that the sample population for the survey was not representative of the population of the country. As a result, the findings may be distorted to a certain degree.

5.4 Recommendation for Further Research

There are many different areas of further research that can be undertaken in relation to the brand awareness of Irish sportswear companies. Here are some areas of further research suggested by the researcher:

- An investigation into the awareness of non sport brands and if this is crucial in the purchase decision of consumers.
- An investigation into the effects that sports teams have on the purchase decisions of supporters.
- Further research on the awareness of Azzurri or O'Neills to discover if their move into rugby league was successful.
- The sponsorship of sports teams within Ireland may justify future research. It could investigate the effectiveness of sponsorship agreements for these companies.
- To investigate the impact of celebrity endorsers and whether they have a positive or negative impact on the company.

5.5 Conclusion

The purpose of this dissertation was to investigate the brand awareness of Irish sportswear companies. This was carried out with a view to obtaining findings that would lead to recommendations being developed that would further add to the existing body of literature currently available. From the findings documented in chapter four, the researcher was able to develop and formulate conclusions and recommendations that are hoped will add to the existing literature.

From the findings it is clear that there is limited awareness of Irish sportswear companies except O'Neills. Apart from O'Neills, other Irish sportswear companies are either relatively small or new and this has an impact on the awareness of the brands. The limited awareness is an area that needs to be addressed if the companies are to grow in the market. The researcher believes that the companies can achieve growth if they adopt some of the recommendation proposed in this dissertation. The findings from the in-depth interviews suggest that the primary focus is quality products with excellent customer service to attract customers but additional aspects such as advertising will need to be taken into account. The companies may not achieve results immediately but increased awareness is hoped to lead to increased sales in the long run.

This dissertation explains in detail what the researcher wanted to achieve from the beginning. It outlines the different steps that were taken to reach a successful conclusion on the brand awareness of the selected sportswear companies. The researcher is satisfied that the research was completed to the best of their ability and documented in a clear and concise way. It is very important for the researcher to show that there is limited awareness of Irish sportswear companies in relation to customers and how these companies can increase the awareness of their brands. It was reached through an extensive investigation of primary and secondary data both of which were essential to the successful completion of the research project. It can be concluded that there is limited awareness of Irish sportswear companies. This awareness must be addressed if the companies are to grow and improve sales in the current market.

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An Investigation into the Brand Awareness of Small and Medium Sportswear Companies Within
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Appendices

Appendix A - O'Neills Financial Statement

Appendix B - In-depth Interview Questions

Appendix C - Transcripts of In-depth Interviews

Appendix D - Brand Awareness Survey

Appendix E - Results of Brand Awareness Survey

Appendix A

An Investigation into the Brand Awareness of Small and Medium Sportswear Companies Within
Ireland
Steven Mc Carron

STEWART & MacLOCHLAINN



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BALBRIGGAN TEXTILES LIMITED
CONSOLIDATED FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31ST DECEMBER 2008



Stewart & Maclochlainn
Chartered Accountants &
Registered Auditors,
Portland House,
Port Road,
Letterkenny,
Co. Donegal.

An Investigation into the Brand Awareness of Small and Medium Sportswear Companies Within
Ireland
Steven Mc Carron

BALBRIGGAN TEXTILES LIMITED
CONSOLIDATED FINANCIAL STATEMENTS

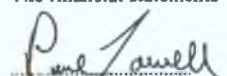
STEWART & MacLOCHLAINN


**PROFIT AND LOSS ACCOUNT
FOR THE YEAR ENDED 31ST DECEMBER 2008**

	Notes	Continuing operations	
		2008	2007
		€	€
Gross profit		10,023,794	10,266,723
Administrative expenses		(9,401,989)	(9,423,122)
Operating profit	3	621,805	843,601
Interest receivable and similar income		81,104	28,871
Profit on ordinary activities before taxation		702,909	872,472
Tax on profit on ordinary activities		(79,849)	(141,880)
Transfer to/from Reserves		-	-
Retained profit for the year		623,060	730,592
Retained profit brought forward		12,218,805	11,488,212
Retained profit carried forward		12,841,865	12,218,804

There are no recognised gains or losses other than the profit or loss for the above two financial years.

The financial statements were approved by the board on 21st September 2009 and signed on its behalf by:


Mr. P. Towell
Director


Mr. A. F. Powell
Director

An Investigation into the Brand Awareness of Small and Medium Sportswear Companies Within
Ireland
Steven Mc Carron

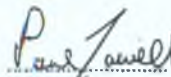
BALBRIGGAN TEXTILES LIMITED

STEWART & MacLOCHLAINN

CONSOLIDATED BALANCE SHEET
AS AT 31ST DECEMBER 2008

	2008		2007	
	€	€	€	€
Fixed Assets				
Intangible assets		127,895		127,895
Tangible assets		6,087,222		5,904,749
Investments		1,045,835		1,045,835
		<u>7,260,952</u>		<u>7,078,479</u>
Current Assets				
Stocks	8,201,848		9,483,725	
Debtors	10,987,225		16,793,221	
Cash at bank and in hand	3,182,770		1,788,615	
	<u>22,371,843</u>		<u>28,065,561</u>	
Creditors: amounts falling due within one year				
	(12,900,753)		(19,254,743)	
Net Current Assets		<u>9,471,090</u>		<u>8,810,818</u>
Total Assets Less Current Liabilities		16,732,042		15,889,297
Creditors: amounts falling due after more than one year				
	(2,274,971)		(2,055,288)	
Net Assets		<u>14,457,071</u>		<u>13,834,009</u>
Capital and Reserves				
Called up share capital		345,467		345,467
Revaluation reserve		1,269,738		1,269,738
Profit and loss account		12,841,866		12,218,804
Equity Shareholders' Funds		<u>14,457,071</u>		<u>13,834,009</u>

The financial statements were approved by the Board on 21st September 2009 and signed on its behalf by:



Paul Towell
Director



Tony Towell
Director

An Investigation into the Brand Awareness of Small and Medium Sportswear Companies Within
Ireland
Steven Mc Carron

BALBRIGGAN TEXTILES LIMITED

STEWART & MacLOCHLAINN

**Cash flow statement
for the year ended 31/12/08**

	Notes	2008 €	2007 €
Reconciliation of operating profit to net cash inflow from operating activities			
Operating profit		621,805	843,601
Depreciation		159,640	144,549
Decrease in stocks		1,281,877	(1,520,404)
Decrease in debtors		5,805,996	1,472,087
(Decrease) in creditors		(6,261,472)	198,574
Net cash inflow from operating activities		<u>1,607,846</u>	<u>1,138,407</u>
Cash flow statement			
Net cash inflow from operating activities		1,607,846	1,138,407
Returns on investments and servicing of finance	15	81,104	28,871
Taxation	15	(74,042)	(91,360)
Capital expenditure	15	(345,482)	(493,139)
Acquisitions and disposals	15	3,370	13,883
		<u>1,272,796</u>	<u>596,662</u>
Financing	15	803,418	-
Increase in cash in the year		<u>2,076,214</u>	<u>596,662</u>
Reconciliation of net cash flow to movement in net funds (Note 20)			
Increase in cash in the year		2,076,214	596,662
Cash inflow from decrease in debts and lease financing		(803,418)	-
Change in net funds resulting from cash flows		<u>1,272,796</u>	<u>596,662</u>
Net debt at 01/01/08		(2,148,515)	(2,745,177)
Net debt at 31/12/08		<u>(875,719)</u>	<u>(2,148,515)</u>

Appendix B

In Depth Interview Questions - Azzurri

- What is Azzurri's primary vision and aim for the brand?
- What do you feel is unique about the Azzurri brand?
- Would you agree that the link between has Azzurri and the GAA has been pivotal is the establishment of the brand?
- Who do you see as your primary competitors in the market place?
- Who are Azzurri core customers?
- What strategies do Azzurri adopt when launching new products to create awareness?
- Do Azzurri use celebrity endorsers to help advertise your products to the public?
- Do Azzurri try to create a bond with the customers to enable loyalty to the brand?
- Do you feel loyalty plays a role in the purchase of Azzurri products?
- Azzurri sponsor a variety of different teams in various different sporting codes. Which do you believe is generating a high level of awareness of the brand?
- What medium do you believe is most vital for creating awareness of the Azzurri brand?
- The recession has affected business in Ireland. What impact has it had on Azzurri strategy and launching of new products?

In Depth Interview Questions – O’Neills

- What is O’Neill’s primary vision and aim for the brand?
- What do you feel is unique about the O’Neills brand?
- Would you agree that the link between has O’Neills and the GAA has been pivotal is the establishment of the brand?
- Who do you see as your primary competitors in the market place?
- Who are O’Neill’s core customers?
- What strategies do O’Neills adopt when launching new products to create awareness?
- Do O’Neills use celebrity endorsers to help advertise your products to the public?
- Do O’Neills try to create a bond with the customers to enable loyalty to the brand?
- Do you feel loyalty plays a role in the purchase of O’Neill’s products?
- O’Neills sponsor a variety of different teams in various different sporting codes. Which do you believe is generating a high level of awareness of the brand?
- What medium do you believe is most vital for creating awareness of the O’Neills brand?
- The recession has affected business in Ireland. What impact has it had on O’Neills strategy and launching of new products?

Appendix C

Transcript of In-Depth Telephone Interview with Jamie Osborne, Sales Development Manager, Azzurri

Date: 20-07-10 Time: 15:00

Hello Jamie, thank you very much for taking this opportunity to speak with me today. I have a few questions I would like you to answer but first I will explain what my dissertation is about. For my dissertation as part of the completion of the Masters of Science in Marketing in IT Sligo, I am investigating the brand awareness of small and medium Irish sportswear companies. I plan to achieve this by conducting interviews with selected companies and by carrying out a brand awareness survey.

Interviewer - Before we start is it okay if I record this conversation to allow me to transcribe it at a later time?

Jamie - Yes, no problem.

Interviewer - What is Azzurri's primary vision and aim for the brand?

Jamie - The main vision here at Azzurri is to provide a wide range of quality Irish products which are customised to meet the needs of each customer individually. We try to meet all needs to the customer's satisfaction and that the products are of the highest standard. The aim is to provide complete customer satisfaction and ensure they are happy with the service they receive.

Interviewer - What do you feel is unique about the Azzurri brand?

Jamie - Each product is designed solely with customer satisfaction in mind; customer satisfaction is one of the key measures of success in our eyes. Azzurri gear is made to ensure maximum comfort and performance of the players who wear it.

Interviewer - Would you agree that the link between Azzurri and the GAA has been pivotal in the establishment of the brand?

Jamie - Obviously it has, it has allowed the company to grow immensely over the last decade and become what it has today. The GAA is ever present throughout the country and this link had been fundamental in gaining an increased customer base.

Due to the increased customer base it led to more revenue for the company which allowed for the development of better quality products. It has also allowed the company to branch into different sports products also.

Interviewer - Who do you see as your primary competitors in the market place?

Jamie - We provide a number of different ranges of clothing and sports gear which means we have a number of different competitors but our primary competitors would be other sportswear companies. Within Ireland, our major competitors would be O'Neills and Gaelic Gear since the end of 2002. These companies offer similar products ranges to us and are also Irish companies. O'Neills are the market leaders for GAA gear so they would be our major competitors in that respect. We have progressed into the rugby market strongly in the UK so we are encountering more competitors such as Canterbury, on that front. Larger sportswear companies such as Nike would also be competitors but we would not be competing as much with these companies currently.

Interviewer - Who are Azzurri core customers?

Jamie - Our core customers would be sports teams around the country. We have a presence in every province in the country with the teams we sponsor in a variety of different sports but primarily GAA teams. We believe that the GAA is the key to our growth since 2002 due to the popularity of GAA within the country. We have started to expand into rugby league in the UK with the Barrow Raiders from 2011. This has potential to open up a new group of customers in another market.

Interviewer - What strategies do Azzurri adopt when launching new products to create awareness?

Jamie - Each product is launched in relation to its own merits and the benefits of the product. We try to create an awareness of the features that will be most beneficial to the customer that will be using it. For example, with our hurling helmets we emphasise the safety features while acknowledging the comfort of the helmets. This is important due to the new guidelines in hurling that require all players to wear helmets.

Interviewer - Do Azzurri use celebrity endorsers to help advertise your products to the public?

Jamie - Each team Azzurri sponsors is seen as an endorser of our products. The teams wear our gear before, during and after their games which ensures the products are seen by as many people as possible. Due to the expensive nature of sponsoring team this is a great benefit for the company.

Interviewer - Do Azzurri try to create a bond with the customers to enable loyalty to the brand?

Jamie - Loyalty is hard for relatively new companies to get. We hope to obtain this loyalty but competing against larger companies can make it difficult. We hope that by providing top quality products for our customers is the key to creating a bond with them. By ensuring that they get the products they require, when they require them the foundation of the future relationship will be built.

Interviewer - Do you feel loyalty plays a role in the purchase of Azzurri products?

Jamie - As previously, loyalty is built over time through providing the best quality products for the customers. If this is done correctly it can be the basis for future purchases and hopefully it will lead to customers recommending our products to others.

Interviewer - Azzurri sponsor a variety of different teams in various different sporting codes. Which do you believe is generating a high level of awareness of the brand?

Jamie - In recent times, the team that has increased awareness of the Azzurri brand has been the Waterford hurling team. They have consistently been involved in the latter stage of the All Ireland hurling championship which increases the amount of exposure the brand receives. Going back though, the Mayo ladies team brought the brand to the fore in the national media due to refusal to wear O'Neills gear after they had signed a deal with Azzurri. This brought the Azzurri brand into the spotlight due to the success of the Mayo ladies team at that time and the potential consequences of them wearing our products.

Interviewer - What medium do you believe is most vital for creating awareness of the Azzurri brand?

Jamie - The teams we sponsor are the best way for us to reach our customers and create awareness of the Azzurri brand. By sponsoring these teams, we are ensuring that there is nearly unlimited potential for our products to be seen by a wide ranging group of potential customers. Television is another avenue to reach our customers but can be expensive to advertise. We let our products quality to speak for itself.

Interviewer - The recession has affected business in Ireland. What impact has it had on Azzurri strategy and launching of new products?

Jamie - The recession has had relatively little impact on us here at Azzurri. We have an efficiently run company that is able to control its production and development of new products. It is locally owned and managed so the management had a great knowledge of the market. One issue that may be relevant is that in the sportswear market, a company must be aware of developments in playing gear to ensure they don't fall behind the competitors.

Interviewer - That is the final question of the interview Jamie, I would like to thank you for your assistance with my study.

Jamie - You're welcome. Hope I was of assistance.

Transcript of In-Depth Interview with Cormac Farrell, Marketing Manager, O'Neills

Date: 14-07-10 Time: 12:00

Hello Cormac, thank you very much for taking this opportunity to speak with me today. I have a few questions I would like you to answer but first I will explain what my dissertation is about. For my dissertation as part of the completion of the Masters of Science in Marketing in IT Sligo, I am investigating the brand awareness of small and medium Irish sportswear companies. I plan to achieve this by conducting interviews with selected companies and by carrying out a brand awareness survey.

Interviewer - Before we start is it okay if I record this conversation to allow me to transcribe it at a later time?

Cormac - That would be fine.

Interviewer - What is O'Neill's primary vision and aim for the brand?

Cormac - The main vision of the brand is to produce unique, innovative and progressive products to the market for our customers. We aim to produce modern and stylish products that will meet the needs and purposes of those that will wear them. Sportswear has to be more stylish and wearable than ever before and here we try to take that into account in the design process.

Interviewer - What do you feel is unique about the O'Neills brand?

Cormac - We offer tailor made services with cutting edge design to the customer. Each product can be adapted and produced to meet the specific needs of individual customers. We do everything possible to make sure they get exactly what they want. This is made easier as we have a totally vertical operation within the company. This allows us to design and manufacture all products to exact detail. This gives complete control of the overall operation and gives a good turnaround time from order to deliver.

Interviewer - Would you agree that the link between has O’Neills and the GAA has been pivotal is the establishment of the brand?

Cormac - The GAA is one of the reasons O’Neills is what it is today. The two have been linked throughout the history of the company. O’Neills is synonymous with the GAA and was the association’s sole provider of gear until very recently. This gave the company a strong position in the marketplace which has been very beneficial. It is very important and was perhaps the most vital aspect in the growth of the company. This link has helped us grow and stay in the customers mind especially throughout the summer months when the GAA championship is on. The GAA is so popular within the country that there is widespread coverage of all the games with many of them on TV. This gives us national coverage which increases the potential customer base. GAA supporters are extremely loyal to their counties and clubs which results in them identifying with the jersey.

Interviewer - Who do you see as your primary competitors in the market place?

Cormac - In Ireland we have a number of competitors who also produce playing gear for GAA teams. This was a new experience for us as we were the primary provider of GAA gear until 2002. This brought new competitors such as Azzurri and Gaelic Gear who would now be our primary competitors in that market. However, we also find ourselves competing against some of the leading sports brands such as Adidas and Puma more recently. These companies are offering individual sponsorship to players and also to county boards which can be hard to compete against in a financial sense. The increase in competition is seen as a good thing as we have to keep improving products to compete successfully. Our progression into the rugby market has brought new competitors. We now compete with Canterbury and Rugbytech in that market.

Interviewer - Who are O’Neill’s core customers?

Cormac - We believe our core customers are that of the counties and team we provide gear for. Each county and team then has their followers who would only buy the products of the own county or team. Essentially each team is a core customer as they give access to a customer base that would not be there if we didn’t sponsor that team. This gives a wide range of income streams.

Interviewer - What strategies do O'Neills adopt when launching new products to create awareness?

Cormac - Each product is launched to advertise the benefits of the specific product. We try to advertise that the products are high quality while being hard wearing and comfortable for the requirements of sports teams.

Interviewer - Do O'Neills use celebrity endorsers to help advertise your products to the public?

Cormac - We use celebrity endorsers but don't see them as such. The teams we produce gear are our celebrity endorsers. They are seen on TV and newspapers weekly but especially in the build up to big games. The more successful the teams, the better for us. Obviously every county can't be successful but when a team reaches the latter stages of the All Ireland Championship, there is a noticeable increase in the sale of merchandise for those counties.

Interviewer - Do O'Neills try to create a bond with the customers to enable loyalty to the brand?

Cormac - Loyalty can be hard to get in the market currently. Customers are more likely to buy something because of the price and not the name which is an issue but we feel customers who play sport are more likely to be loyal to a specific brand. Also, the association O'Neills has with the GAA means some people would hesitate to purchase an alternative brand for their playing gear such as jerseys and balls specifically.

Interviewer - Do you feel loyalty plays a role in the purchase of O'Neill's products?

Cormac - We feel that loyalty plays a role in the purchase of sporting goods; people will usually have a greater bond with a sporting product due to the link to the games they play. If a player is successful wearing a certain companies gear, this has the potential to create an attachment to that company. From this it is possible that loyalty will play a role in the future purchases of that person.

Interviewer - O'Neills sponsor a variety of different teams in various different sporting codes. Which do you believe is generating a high level of awareness of the brand?

Cormac - This can vary from year to year; the teams that are more successful will create more awareness of the brand. The further a team progresses in the All Ireland the more awareness it creates. Teams like Kilkenny hurling team continuing success is extremely good for the brand. However, the bigger and more populated counties such as Dublin, Cork and Galway are important to create awareness of the brand. An added benefit with these counties is that they are competitive in both the football and hurling championship which gives them increased exposure in the media.

Interviewer - What medium do you believe is most vital for creating awareness of the O'Neills brand?

Cormac - I believe that the most vital medium for creating awareness of the brand is through television. The teams that wear our products can be broadcast around the country but this can also be viewed over the internet which can extend our reach globally. By seeing our brand on television, people can see what O'Neills is and what it represents. An All Ireland winning captain lifting the cup wearing an O'Neill's jersey can be an inspiration to the people watching and it links the company with a winning team. This is reflected in our choice of motto, the choice of champions.

Interviewer - The recession has affected business in Ireland. What impact has it had on O'Neills strategy and launching of new products?

Cormac - Obviously the recession is an issue for businesses in Ireland but we it has not affected us to badly. We have a strong business strategy that has helped us to stay competitive in the marketplace. If we stick to our primary aims of unique, innovative and progressive products, we should have no issues business wise. The launching of new products is important as the company must stay relevant and stylish to compete with the larger sportswear companies but our vertical operation allows us to control all aspects of the manufacturing process from concept to the delivery within a good time frame.

An Investigation into the Brand Awareness of Small and Medium Sportswear Companies Within
Ireland
Steven Mc Carron

Interviewer - That is the last of my questions. Thank you very much for your time and assistance.

Cormac - No problem, glad I could help you.

Appendix D

Brand Awareness Survey

This survey is a part of my dissertation for my Masters of Science in Marketing. The title of the dissertation is “an investigation into the brand awareness of small and medium sportswear companies within Ireland”. The primary focus is on companies that are Irish owned and operate primarily within the Irish market and also the awareness of the general public to their brand and products.

The general public’s participation is required as it will give an insight into how popular the selected brands are and if there is potential for customer loyalty to these companies. The survey will consist of a variety of different questions that will examine the:

- Classification variables - age, gender etc.
- Extent of knowledge of the brands
- Attitudes, interests and opinions
- Behaviour - past present or intended

I assure you of the confidentiality of your response. I sincerely thank you in advance for taking the time to complete this survey. Your help is much appreciated.

Yours faithfully
Steven Mc Carron

An Investigation into the Brand Awareness of Small and Medium Sportswear Companies Within
Ireland
Steven Mc Carron

1. Gender

Male

Female

2. Age

Under 18

18-24

25-34

35-44

Over 45

3. Do you play sports?

Yes

No

4. What brands comes to mind when you want to purchase sportswear?

5. What companies come to mind when you think of Irish sportswear companies?

6. What sports do you primarily associate with the following Irish companies?

Azzurri

Jako

O'Neill's

7. What types of sportswear do you associate with the following Irish companies?

Azzurri _____

Jako _____

O'Neill's _____

8. Have you seen advertisements for the following Irish companies? If yes, please list where.

Yes No

Azzurri

Jako

O'Neills

9. Can you determine which motto belongs to which sportswear company?

Impossible is Nothing _____

Choice of Champions _____

Living Sports _____

Just Do It _____

I Am What I Am _____

10. Do you feel Irish sportswear companies advertise their products effectively to the Irish market?

Yes No

11. If no, how do you feel these companies could improve their advertisements of their products?

12. Of your last 10 purchases of sportswear, were any of the products from the following Irish companies? If yes, please list the products purchased.

	Yes	No
Azzurri	<input type="checkbox"/>	<input type="checkbox"/>
Jako	<input type="checkbox"/>	<input type="checkbox"/>
O'Neills	<input type="checkbox"/>	<input type="checkbox"/>

13. How do you rate the products of Irish sportswear companies?? Please tick box 1 - 5 (1 for low quality, unreliable and 5 for high quality, reliable)

1 2 3 4 5

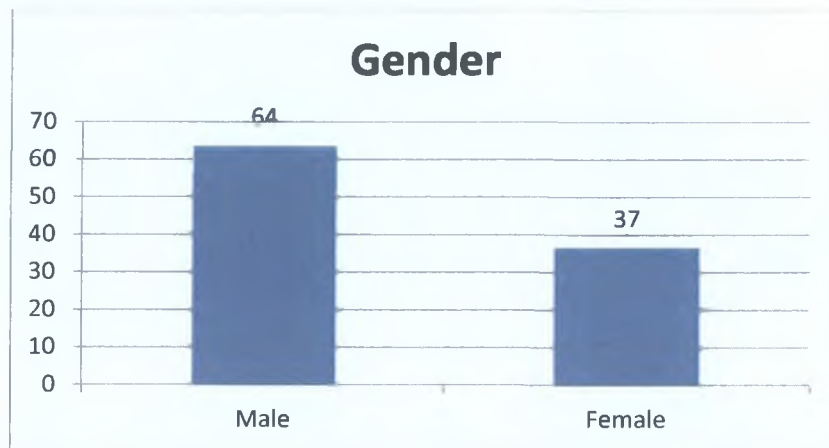
14. Have you any other comments on Irish sportswear companies

Appendix E

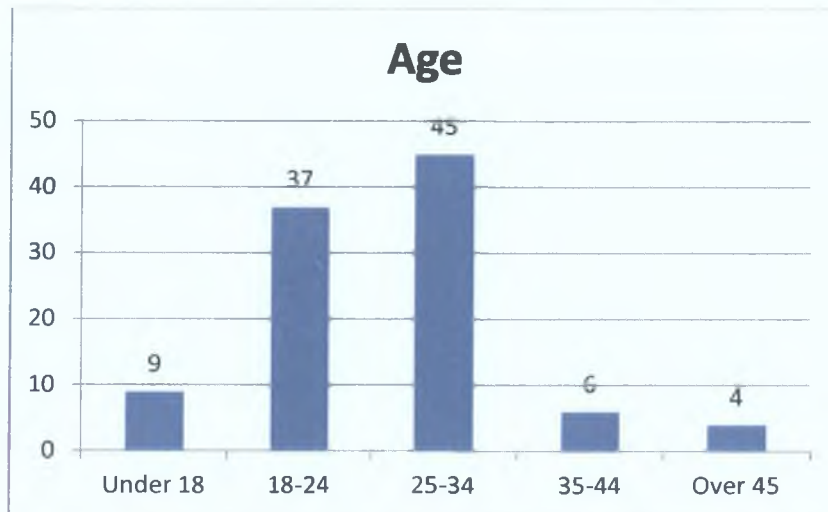


Results of Brand Awareness Survey

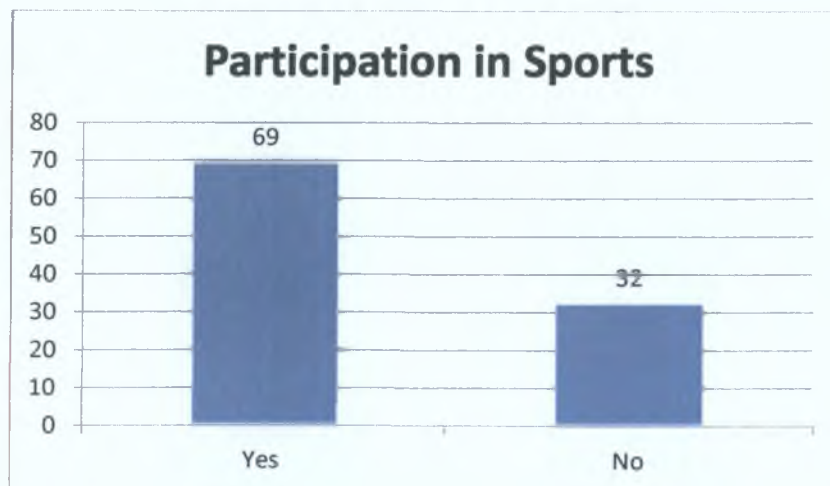
1. Gender



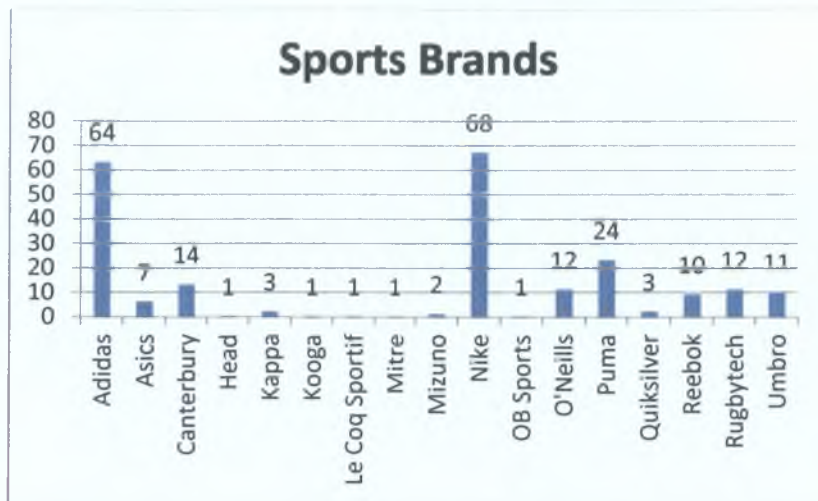
2. Age



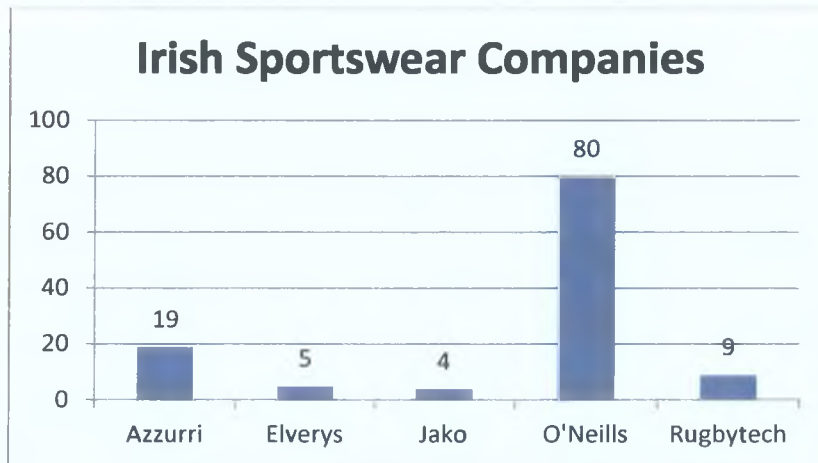
3. Do you play sports?



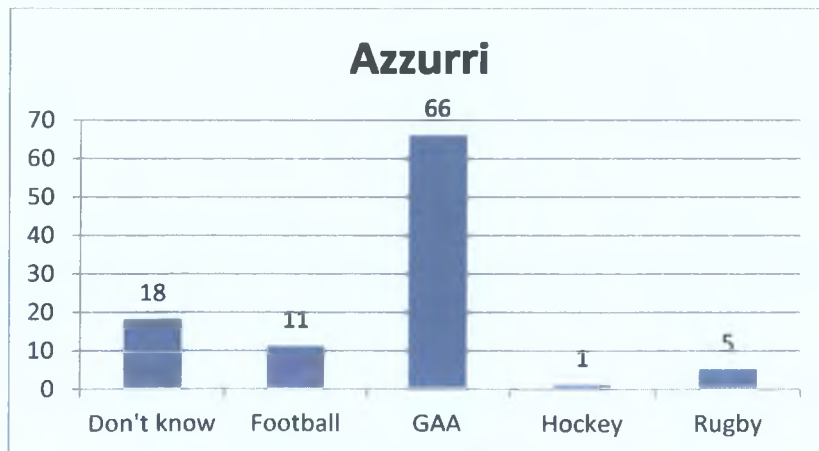
4. What brands come to mind when you want to purchase sportswear?

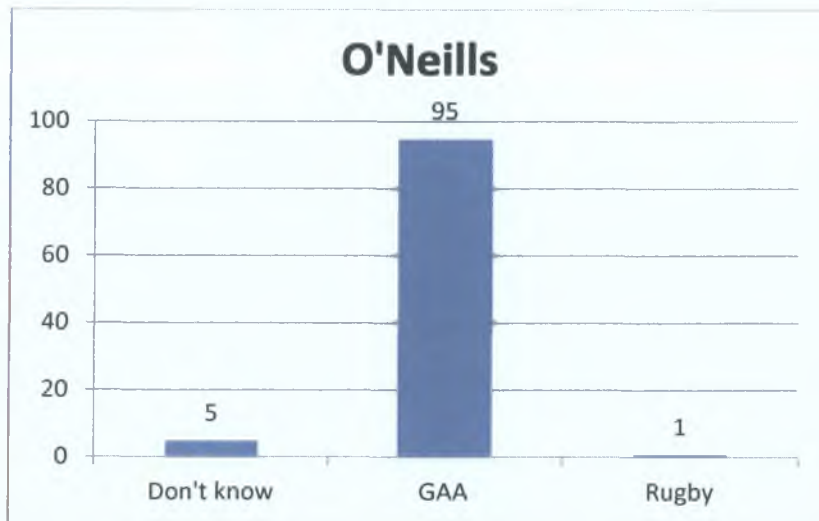
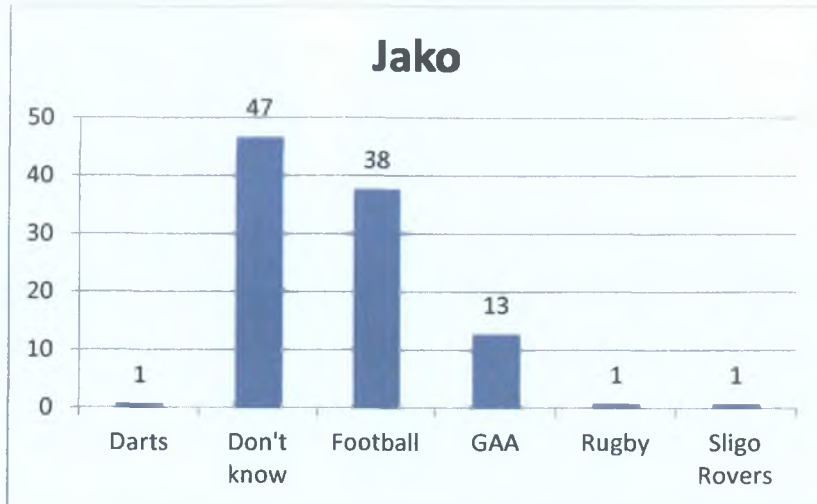


5. What companies come to mind when you think of Irish sportswear companies?

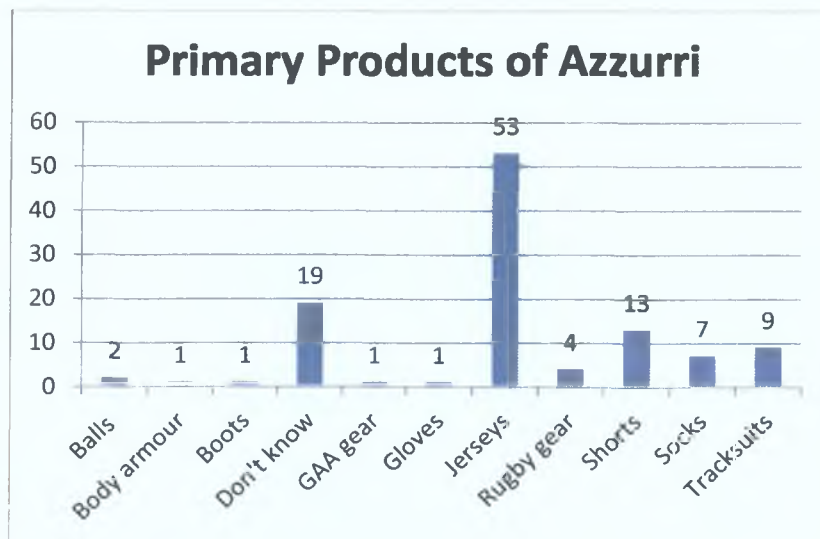


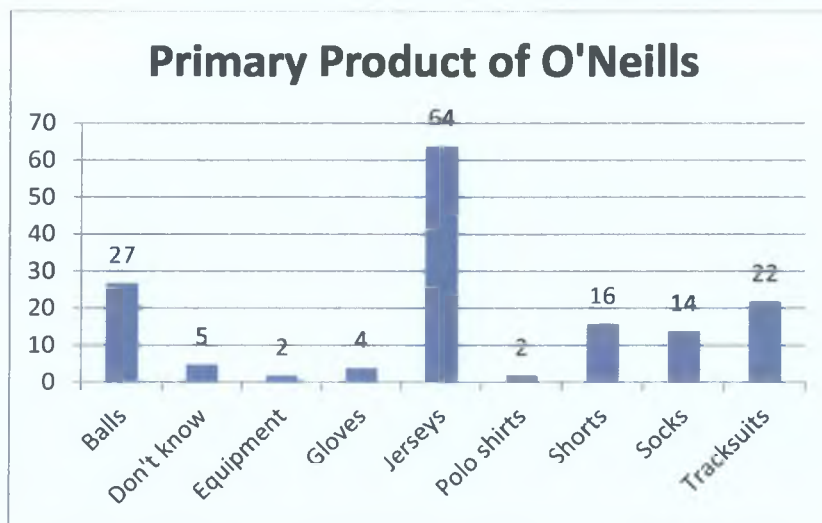
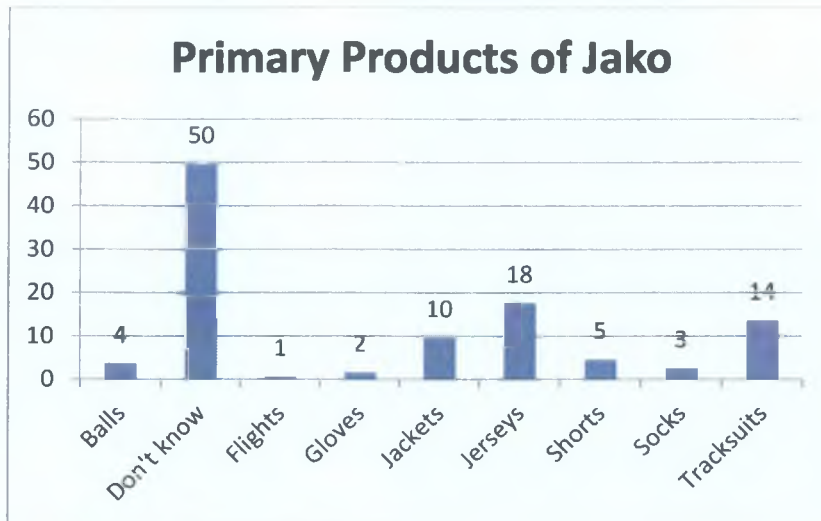
6. What sports do you primarily associate with the following Irish companies?



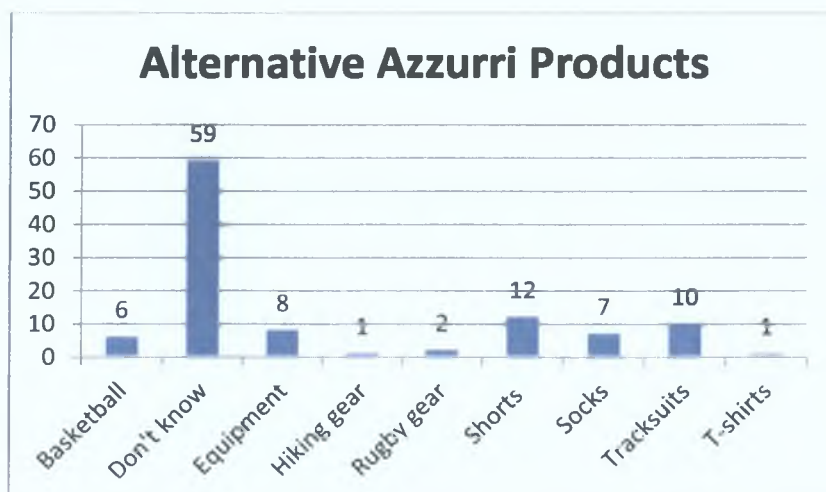


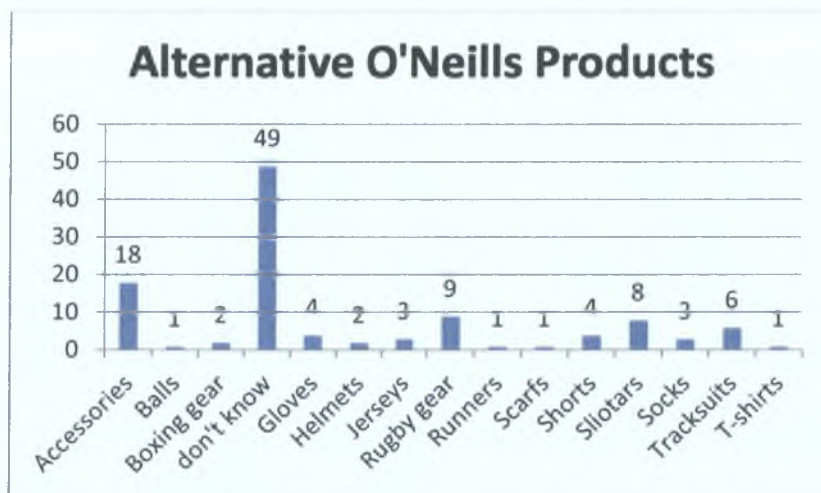
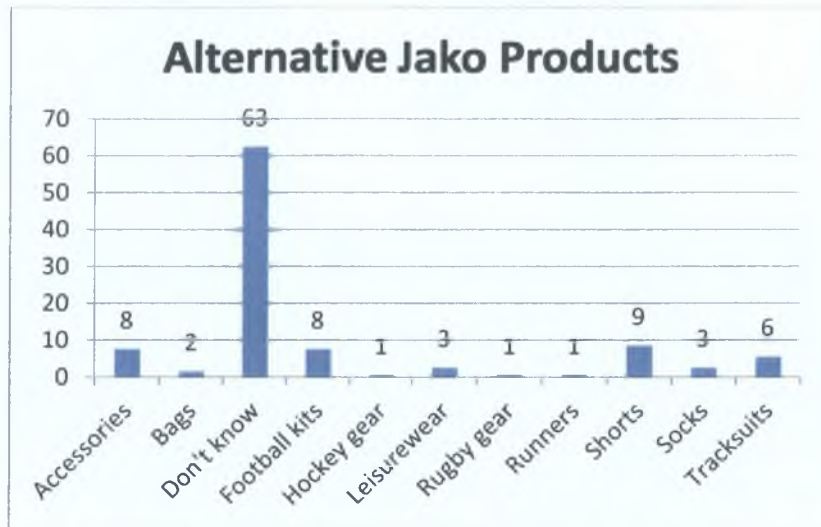
7. What types of sportswear do you associate with the following Irish companies?





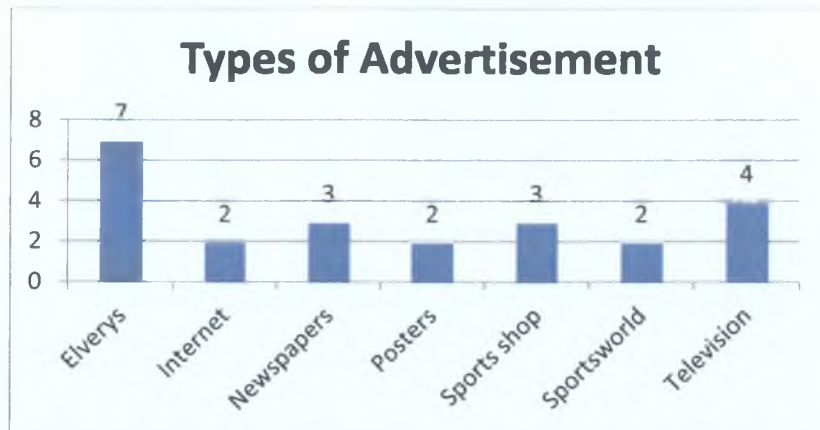
8. What other types of sportswear do you think the following Irish companies sell?





9. Have you seen advertisements for the following Irish companies? If yes, please list where.

	Yes	No
Azzurri	19	82
Jako	7	94
O'Neills	47	54



10. Can you determine which motto belongs to which sportswear company?

Impossible is nothing:	Adidas	75
	Don't know	25
	Nike	1
Choice of champions:	Adidas	1
	Azzurri	1
	Don't know	87
	O'Neills	9
	Slazenger	1
	Umbro	2
Living sports:	Don't know	98
	Jako	2
	Puma	1
Just do it:	Don't know	5
	Nike	96
I am what I am:	Don't know	82
	O'Neills	1
	Reebok	17
	Tiger Woods	1

11. Do you feel Irish sportswear companies advertise their products effectively to the Irish market?

Yes	19
No	82

12. If no, how do you feel these companies could improve their advertisements of their products?

	Number of Responses
Advertise alternative products to the GAA gear which will increase customer's knowledge of products	3
Advertise direct to sports clubs	3
Advertise in schools/colleges	1
Bigger commercial advertising campaigns	1
Brochures dedicated specifically to sports teams	2
Discounts to sports clubs purchasing gear in bulk	2
Emphasis on Irishness of the companies	2
Have never seen adverts for Irish sports companies and if I have I did not know they were Irish companies	1
Increase advertising	1
Increased use of company reps	1
Internet adverts/Facebook	5
Introducing the products through local clubs	1
More advertising in local rather than national media	4
More adverts on television and radio	26
Newspapers	3
Promotions/lower prices	3
Selective branding	1
Special offers for sports teams	2
Sponsorship of events - local festivals and competitions	4
Sponsorship of local clubs	9
Use female sports players to advertise products	3
Use of Irish sports players	2
Use of local sports players in adverts	4

13. Of your last 10 purchases of sportswear, were any of the products from the following Irish companies? If yes, please list the products purchased.

	Yes	No
Azzurri	8	93
Jako	1	100
O'Neills	22	79



14. How do you rate the products of Irish sportswear companies?

Low quality	7
Fair quality	28
Average	41
Good quality	14
High quality	11

15. Have you any other comments on Irish sportswear companies.

- Advertise their products more effectively
- Create an option for online shopping for Irish companies
- Create Facebook profiles for the companies
- Did not know Azzurri and Jako were Irish companies
- Do not give you much of selection
- Good to be Irish
- Increase female specific gear
- Increase internet advertising

Increase promotion of leisurewear to customers
Knowledge of products is limited
Lack of female specific products
Lots of Irish people play sports and potential for more sales
More gear for players
Need more advertising
No innovation - just follow market leaders like Nike
Not adaptable to other sports
Not a great selection of products
Only see their gear on people who play sports
Products could be better
Products too expensive with all the competition in the market
Promote the products as Irish
Quality, affordable gear
Should reach out to other sports areas
Target other sports instead of just GAA
Use more high profile personalities for advertising
Who are they?