ISTANBUL TECHNICAL UNIVERSITY ★ GRADUATE SCHOOL OF SCIENCE ENGINEERING AND TECHNOLOGY

MARKET LEADER AND MARKET CHALLENGER STRATEGIES OF APPAREL INDUSTRY IN DIGITAL SPACE: A CONTENT ANALYSIS OF INSTAGRAM POSTS OF LC WAIKIKI AND KOTON

M.Sc. THESIS

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HAZIR GİYİM SEKTÖRÜ PAZAR LİDERİ VE MEYDAN OKUYUCUSUNUN DİJİTAL ALANDA STRATEJİLERİ: LC WAIKIKI VE KOTON'UN INSTAGRAM GÖNDERİLERİNİN İÇERİK ANALİZİ

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Yuksel Saglam, a M.Sc. student of İTU Graduate School of Science Engineering and Technology student ID 507161034, successfully defended the thesis/dissertation entitled "MARKET LEADER AND MARKET CHALLENGER STRATEGIES OF APPAREL INDUSTRY IN DIGITAL SPACE: A CONTENT ANALYSIS OF INSTAGRAM POSTS OF LC WAIKIKI AND KOTON", which he prepared after fulfilling the requirements specified in the associated legislations, before the jury whose signatures are below.

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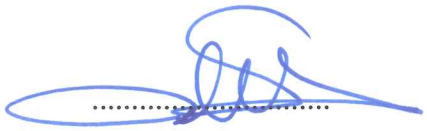

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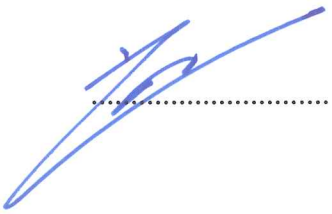

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FOREWORD

This thesis is written as completion to the master of Management Engineering, at the Istanbul Technical University.

In this thesis, comparative and seasonal marketing strategies of Turkey apparel industry market leader LC Waikiki, and market challenger Koton is investigated through Instagram posts of both brands by performing chi-square test of independence, and effect size analyses.

I would like to thank to my advisor, Assoc. Prof. Dr. Elif KARAOSMANOGLU especially for her excellent guidance and support during this process. I also would like to thank to my family, friends, my colleagues in my workplace, and especially my wife for their cooperation.

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SUMMARY

With the increasing presence of international companies in the local markets, the inclusion of new brands in local markets, the faster consumption of apparel compared to the past, and the increasing orientation of the consumer towards branded products from unbranded products, the competitive environment in the apparel sector is increasing day by day.

In the digitalizing world, as media channels are increasingly shifting to digital fields, digital marketing activities are becoming vital for brands. In social platforms, a lot of branded or unbranded content is produced every day and for the brands it is important that the content produced is communicated to their target audience in a productive manner. For this reason, it is important to understand the structure of content produced by brands in social media. In Turkey, Instagram is the second most active social media platform following YouTube.

In this thesis, it is aimed to analyze contents on Instagram accounts of Turkey apparel industry market leader LC Waikiki, and its challenger Koton. Standard posts on both brands' Instagram accounts from March 1, 2018, to March 1, 2019 are analyzed. Total 924 posts are coded based on established codebook. Codebook in this paper consisted of two main categories: Marketing strategy and other descriptive data. Dataset is run in IBM SPSS Statistics using descriptive statistics. Chi-square test of independence is conducted in order to see associations between brands overall, and between seasons for both brands. Effect sizes are also examined through Phi and Cramer's V.

Content analysis shows that first three marketing strategies performed by both brands are product imagery without brand elements, celebrity and influencer endorsement, and brand elements. On the other hand, brands differ from each other in certain marketing strategies such as product placement in TV series and price promotions. There is also seasonality in terms of marketing strategies performed by both brands on Instagram. LC Waikiki, for instance performs children-related content marketing strategy only in autumn when schools reopen. In terms of other descriptive data there are some implications such as four most product types shared by both brands are tops, bottoms, outerwear, and footwear. In addition, brands differ from each other in terms of slogans shared in Instagram posts. LC Waikiki communicates fashion in their slogans, while Koton communicates style.

HAZIR GİYİM SEKTÖRÜ PAZAR LİDERİ VE MEYDAN OKUYUCUSUNUN DİJİTAL ALANDA STRATEJİLERİ: LC WAIKIKI VE KOTON'UN INSTAGRAM GÖNDERİLERİNİN İÇERİK ANALİZİ

ÖZET

Uluslararası firmaların yerel pazarlardaki mevcudiyetini arttırması, yerel pazarlara yeni markaların dahil olması, hazır giyimin geçmişe gore daha hızlı tüketiliyor oluşu, ve tüketicilerin markasız ürünlerden markalı ürünlere yöneliminin artmasıyla hazır giyim sektöründeki rekabet günbegün artmaktadır. Bu rekabet ortamında firmaların iş stratejilerini gözden geçirmeleri önem kazanmaktadır.

İşletmeler arasındaki rekabeti oluşturan faktörler arasında; mevcut işletmeler arasındaki rekabet, pazara yeni işletmelerin dahil olması tehditi, tedarikçilerin pazarlık gücü, ikame ürünlerin tehditi, ve tüketicinin pazarlık gücü yer almaktadır. Bu rekabet ortamında markalar rekabetçi konumları açısından kategorize edilmektedir. Pazar lideri; sektörde en çok pazar payına sahip markadır. Sektördeki pazar payını arttırmaya çalışan marka pazar meydan okuyucusudur. Sektördeki pazar payını korumak isteyen ve risk almayan marka pazar takipçisi olmaktadır. Bir diğer yandan pazarda diğer markaların önemsemediği, niş kitlesi olan küçük faaliyet alanlarında hizmet veren markalar da bulunmaktadır.

Türkiye hazır giyim sektörü verilerine bakıldığında 2012'den 2017 senesine hacimsel büyüme 7.4% iken, değersel büyüme 79% olmuştur. 2018 senesinde Türkiye hazır giyim sektörü pazar lideri LC Waikiki iken, pazar meydan okuyucusu ise Koton olmuştur. Bu iki markayı sırasıyla Defacto, Mavi, ve H&M takip etmektedir. Türkiye, yeni alışveriş merkezi ve yeni mağaza açılışları nedeniyle en hızlı büyüyen hazır giyim pazarlarından biri olarak Avrupa'nın en sağlam ekonomilerinden birine sahip olmaya devam etmektedir. Tüketicilerin markasız ürünlerden markalı ürünlere yönelimi pazarı olumlu etkilemektedir. Aynı zamanda moda haftası ve alışveriş festivalleri turistlerin Türkiye'den kıyafet alması için fırsat oluşturmaktadır.

Türkiye hazır giyim sektörü kategorilerindeki eğilimler sektörün büyüme yaşayacağına dair işaretler göstermektedir. Çocuk giyim kategorisini; ülkedeki çocuk nüfusunun fazlalığı, ebeveynlerin bebek ve çocuk bakımı hususunda artan farkındalığı, ve çevrim içi medyanın çocukların imajına olan odağı olumlu etkilemektedir. Kadın giyim kategorisinde ise; büyük şehirlerde yaşayan çalışan kadın sayısındaki artış, ve şehirli genç kadınların son trendlere olan hassasiyeti olumlu etki yaratmaktadır. Kişisel görünümün Türk erkekleri arasında daha çok önem kazanması, ve erkeklerin Facebook ve Instagram gibi sosyal medya platformlarından önemli derecede etkilenerek modaya uygun görünüme sahip olmak istemesi, erkek giyim kategorisini olumlu yönde etkilemektedir. Markasız ayakkabılardan markalı ayakkabılara yönelim ayakkabı kategorisini olumlu etkilemekteyken, spor giyim kategorisi de ülkede spora olan ilginin artmasıyla olumlu etkilenmektedir.

Pazarlama aktiviteleri işletmeler için önemli bir rol oynamaktadır. Reklam ise pazarlama karmasının önemli bileşenlerinden biridir. Sadece müşteri değeri yaratmakla kalmayıp aynı zamanda hedef tüketicileri de angaje etmek için şirketler reklam faaliyetlerini etkin bir şekilde kullanmalıdır. Verimli bir reklamcılık aktivitesi için, reklamın içeriği, hedef kitleye uygunluğu, doğru zamanda doğru kanalda yer alması gerekliliği giderek önem kazanmaktadır.

Dijitalleşen dünyada, medya kanalları da dijital alanlara kaymaktadır. Medya yatırımları geleneksel mecralardan dijital mecraya kaymaktadır. 2015'te televizyon dünyada ve Türkiye'de en çok yatırım yapılan mecra iken 2018'de dijital mecra dünyada birinciliği ele almış, Türkiye'de ise payını önemli ölçüde arttırmıştır. Aynı zamanda medya tüketimi de çevrim dışı platformlardan çevrim içi platformlara kaymaktadır. 2015'ten 2018'e en çok internet ve mobil internetin tüketimi artmış iken televizyon, radyo, gazete, ve derginin tüketimi azalma göstermiştir. Bu nedenle, günümüzde dijital pazarlama faaliyetleri markalar için hayati önem arz etmektedir. Sosyal medya platformları tüm dünyada olduğu gibi Türkiye'de de giderek daha fazla tüketilmektedir. Instagram, YouTube'dan sonra Türkiye'deki en aktif ikinci sosyal medya platformudur. Bununla birlikte Türkiye, Instagram'ın adreslenebilir reklam kitlesi açısından dünyada birinci sırada yer almaktadır. Sosyal medya platformlarında her gün çok sayıda markalı veya markasız içerik üretilmekte ve markalar için üretilen içeriğin hedef kitleye verimli bir şekilde iletilmesi önem taşımaktadır. Bu nedenle, markaların sosyal medyada ürettikleri içeriğin yapısını anlamak önem arz etmektedir.

Bütün bu gerçeklerin ışığında; bu tezde, Türkiye hazır giyim sektörü pazar lideri LC Waikiki ve pazar meydan okuyucusu Koton'un Instagram hesaplarındaki içeriği analiz etmek amaçlanmıştır. Pazarlama ve reklam perspektifinden içerik analizi, bir reklam uygulama modelinin veya marka konumlandırma, satış teklifi ve yaratıcı ton gibi markaların reklam stratejilerinin öğelerini tanımlamak için gerçekleştirilen sistematik, objektif ve nicel bir analizdir. 4 çeşit içerik analizi bulunmaktadır. Bunlar; tanımlayıcı içerik analizi, çıkarımsal içerik analizi, psikometrik içerik analizi, ve kestirimci içerik analizidir. Bu tezde tanımlayıcı ve çıkarımsal içerik analizi yapılmıştır. İçerik analizinin bileşenleri ise; birimlere ayırma, örnekleme, kodlama, indirgeme, sonuç çıkarma, ve hikayeleştirmedir. Bu tezde yapılan içerik analizinde tüm bileşenler uygulanmıştır.

Yapılan içerik analizinin sonunda her iki markanın Instagram'ı pazarlama perspektifinden nasıl kullandığı, her iki markanın birbirinden nasıl farklılaştığı, ve her iki markanın Instagram içeriklerinde mevsimsellik olup olmadığına dair çıkarımlar yapmak amaçlanmıştır. Mevsimselliğin da inceleneceği göz önünde bulundurularak incelemenin yapılacağı periyot 1 Mart 2018'den 1 Mart 2019'a kadar olacak şekilde belirlenmiştir. Bu süreçte LC Waikiki'nin 583, ve Koton'un 706 olmak üzere iki marka tarafından toplamda 1289 gönderi paylaşılmıştır. Araştırmanın yapıldığı dönemde 4 adet Instagram gönderi tipi bulunmaktadır. Bunlar; standart gönderi, yeniden paylaşılan gönderi, kaydırmalı gönderi, ve hareketli görsellerdir. En çok paylaşılan gönderi tipi ise standart gönderidir. Standart gönderiler haricindeki gönderiler çıkarıldığında veri kümesinin son hali LC Waikiki'nin 401, Koton'un 523 olmak üzere toplamda 924 adet gönderiden oluşmuştur. Daha sonra gönderileri kodlama işlemi için kod çizelgesi oluşturulmuştur. Kod çizelgesi oluşturulurken daha önce yayımlanmış araştırmalar, araştırılan sektörün dinamikleri, ve seçilen medya kanalının yapısı göz önünde bulundurulmuştur. Oluşturulan kod çizelgesine göre toplam 924 adet gönderi

kodlanmıştır. Kodlama işlemini iki farklı kodlayıcı yapmıştır. IBM SPSS Statistics yazılımında güvenilirlik analizi yapılmış ve olumlu sonuç alınmıştır. Bu tezde yer alan kod çizelgesi iki ana kategoriden oluşmuştur: Pazarlama stratejisi ve diğer tanımlayıcı veriler. Pazarlama stratejisi kategorisinin 12, diğer tanımlayıcı veriler kategorisinin ise 29 adet alt kategorisi mevcuttur. Pazarlama stratejisi alt kategorileri; kurumsal sosyal sorumluluk, ünlü kullanımı, fiyat promosyonları, özel teklifler, çocuklarla ilgili içerik, sponsorluk ve ortaklık, marka öğeleri, marka öğeleri yer almayan ürün görselleri, yarışma, televizyon dizilerinde ürün yerleştirme, ürün fiyatı, ve belirgin bir pazarlama stratejisi olmayan gönderidir. Diğer tanımlayıcı veriler alt kategorileri ise; gerçek insan, kadın, erkek, çocuk, hayvan, dış mekan, iç mekan, metin, logo, elbise, üst giyim, alt giyim, dış giyim, iç giyim, ev giyim, spor giyim, mayo, ayakkabı, aksesuarlar, ev kategorisi, moda sloganı, kadın sloganı, stil sloganı, aşk sloganı, okula geri dönüş sloganı, koleksiyon sloganı, renk sloganı, diğer slogan, ve özel gün bahsidir. Veri kümesi, tanımlayıcı istatistikler kullanılarak IBM SPSS Statistics yazılımında çalıştırılmıştır. Markalar arasındaki ilişkiyi, ve her iki markanın mevsimselliklerini incelemek için ki-kare bağımsızlık testi yapılmıştır. Ayrıca Phi ve Cramer's V ile etki büyüklükleri de incelenmiştir.

İçerik analizi, her iki markanın da uyguladığı ilk üç pazarlama stratejisinin, marka öğeleri yer almayan ürün görselleri, ünlü kullanımı, ve marka öğeleri kullanımı olduğunu göstermektedir. Öte yandan, markalar çocuklarla ilgili içerik, yarışma, televizyon dizilerinde ürün yerleştirme, ve fiyat promosyonları gibi belirli pazarlama stratejilerinde birbirlerinden farklılaşmıştır. Instagram'da her iki markanın da uyguladığı pazarlama stratejileri açısından mevsimsellik de bulunmaktadır. Örneğin LC Waikiki, çocuklarla ilgili içerik pazarlama stratejisini yalnızca sonbaharda okullar yeniden açıldığında gerçekleştirmektedir. Bunun yanı sıra; sponsorluk ve ortaklık, televizyon dizilerinde ürün yerleştirme, ve marka öğeleri yer almayan ürün görselleri pazarlama stratejilerinde de mevsimsellik bulunmaktadır. Koton'da ise ünlü kullanımı pazarlama stratejisinde mevsimsellik bulunmaktadır. Her iki markanın da en çok paylaştığı dört ürün tipi ise üst giyim, alt giyim, dış giyim ve ayakkabı olmuştur. Ayrıca, Instagram paylaşımlarında paylaşılan sloganlar açısından markalar birbirinden ayrılmıştır. LC Waikiki, sloganlarında modadan bahsederken Koton tarzdan bahsetmektedir.

1. INTRODUCTION

The apparel industry plays a great role for the economy in terms of trade, employment, investment and revenue all over the world. The apparel industry has a short product life cycle and more product differentiation. With the evolution of technology, fashion is consumed more rapidly and accordingly consumer demands change at a great pace. International brands are increasing their market network worldwide, and new brands are entering into global and local markets, and the consumer population is increasing day by day. The global apparel industry continues to grow at a healthy rate. In the light of all these facts, there is a serious competition in the apparel industry. In this competitive environment, companies have to re-examine their business strategies.

Marketing activities play an important role for businesses as S.F. Slater et al. (2010) suggested that "marketing is a boundary function linking the business with its customers" (p. 471) contributing to acquire new customers and retain existing ones. According to Kotler and Armstrong (2018), "Marketing is the process by which companies engage customers, build strong customer relationships, and create customer value in order to capture value from customers in return" (p. 29). Advertising and public relations are important components of marketing mix as it is suggested that "companies must do more than simply create customer value, and they must also engage target customers and clearly and persuasively communicate that value to them" (Kotler and Armstrong, 2018, p. 452). In order to not only simply create customer value but also engage target consumers, companies must utilize advertising activities effectively.

For an efficient advertising activity, the content of the advertising, its appropriateness to the target audience, the necessity to take place in the right channel at the right time is becoming increasingly important. The media sector is also significantly affected by the rapidly changing and digitalizing world. It is inevitable that the brands that cannot keep up with this change will have difficulty in maintaining their place in the market in such an environment where the competition level is so intense.

In the digitalized world, digital channel is getting a significant share in the media expenditures of companies. Display ads, search engine optimization, pay-per-click (PPC) ads, email marketing and social media marketing are some examples of digital marketing activities (Chaffey and Ellis-Chadwick, 2016). Social media marketing is an important component of digital marketing activities since it may affect the reputation of brands positively (Kim and Ko, 2010). Instagram is, especially in Turkey, an important social networking platform for brands to conduct their social media marketing activities since Turkey is the global leader in terms of Instagram's addressable advertising audience, compared to population aged more than 13 with the percentage of 58% where worldwide average is only 15% according to Global Digital Report 2019 prepared by We Are Social in partnership with Hootsuite. Therefore, analysis of official Instagram accounts of brands and accordingly created content becomes significant for the brands with the presence in Turkey market.

The focus of this paper is to conduct a content analysis of Instagram posts of market leader and its challenger in Turkey apparel industry.

The structure of this paper is organized as follows. In section 2, competitive strategies, in section 3, Turkey apparel industry overview and market shares of brands, in section 4, media transformation, and social media marketing tools and related figures, in section 5, content analysis definition, types, components, and previous researches, in section 6, research design, in section 7, analysis, interpretation of findings, and limitations, and finally, in section 8, conclusion are discussed.

2. COMPETITIVE STRATEGIES

According to Porter (1998), there are five forces driving industry competition:

- Industry competitors: Competition between existing companies
- Potential entrants: Threat of new entrants
- Suppliers: Bargaining power of suppliers
- Substitutes: Threat of replacement products or services
- Buyers: Bargaining power of consumers

Porter (1998), indicates that when dealing with five forces that drive industry competition, there are three potentially successful generic strategic approaches to performing better than other companies in a sector:

- Overall cost leadership: Working hard to achieve the lowest production and distribution costs, by this means making prices lower than rivals and obtaining a great market share.
- Differentiation: Focusing on creating highly diversified product line and marketing program to be the class leader in the industry
- Focus: Striving to provide services in several market segments instead of pursuing the entire market.

On the other hand, Treacy and Wiersema (1993) suggest a more customer oriented classification of competitive marketing strategies:

- Operational excellence: Providing superior value by leading the industry in price and convenience, reducing costs and creating a lean and efficient value distribution system, and serving customers who want reliable, quality products or services but want them in a cheap and easy way.
- Customer intimacy: Providing superior value by segmenting the markets precisely and adapting products or services to fit exactly the needs of targeted

customers, and specializing in meeting unique customer needs by building close relationships with customers.

- Product leadership: Providing superior value by offering leading-edge products or services, and serving customers who want the latest technology products and services, regardless of cost or price.

Kotler and Armstrong (2018), categorizes brands in terms of their competitive positions:

- Market leader: A company with the largest market share in the sector.
- Market challenger: A company struggling to increase its market shares in the sector.
- Market follower: A company that wants to maintain its share in the sector without taking risks.
- Market nicher: A company that serves small segments where other companies in a sector ignore.

Compared to challenger brands in the industry, leaders are more likely to experience market share erosion if they are less aggressive (Ferrier et al, 1999). Market leaders can remain as market leader by finding ways to increase total demand, protecting their market shares through good protective and aggressive actions, and trying to expand their market share even if market size remains constant. According to Mundrey (2018), in order market leader to react to market challenger, market leader needs to play to its strengths, offer the power of nature and science, manage the balance of global and local, seize the trend, and fire on innovation.

On the other hand, market challenger can challenge the market leader by initiating a front attack, in line with the leader's product, advertising, price and distribution efforts. The challenger attacks not the weaknesses of the leader but its strengths. However, if the market challenger has less resource than the leader, the front attack is of little significance. In this case, market challenger can make an indirect attack on the market leader's weaknesses or its gaps in the market. For the challenger brands, creativity in the creation of all kinds of communication and promotion is a commercial tool that is sought in a brutal way against the leader brands and used as a basic resource for its competitive advantage (Morgan, 2009). In this respect, a

communication idea does not just become a part of the marketing mix and at least becomes a potentially high leverage. The emergence of social networks and other active online communities is an opportunity to increase brand awareness with limited budgets for challenger brands.

3. APPAREL INDUSTRY IN TURKEY

3.1 Segments in Apparel Industry

According to apparel and footwear in Turkey report by Euromonitor International in 2018, Turkey, as one of the fastest growing apparel markets due to the opening of new shopping center and new store openings continues to have one of Europe's most robust economies. Consumer shifts from branded and counterfeit products to branded products continues to have a positive impact on the market. Fashion week and shopping festivals at the same time are allowing Turkey to become an important center for the tourists to purchase clothing from Turkey.

Large young population of Turkey, has further enhances the needs of consumers throughout the review period. Focusing on young consumers leads clothing and footwear companies to use more social media sites such as Facebook and Twitter. Most companies are expected to develop applications for mobile devices to increase customer exposure. The most popular brands are increasingly using internet social networks like Facebook to support new launches. The increase in smartphones leads to a shift to multi-channel retailing; the use of a variety of channels in a customer's shopping experience, including research prior to purchase.

It is estimated that apparel will grow due to the expansion of the middle class, more women in the workplace and the opening of new shopping centers. Apparel is expected to continue to attract foreign investments and the estimated time over Turkey market is expected to be more upscale brands. Considering that the number of shopping centers will rise to 520 in 2023, more domestic and foreign private equity firms and multinational fashion retailer is expected to deal with Turkey.

Overview of the segments in apparel industry according to apparel and footwear in Turkey report by Euromonitor International in 2018, are explained below:

- Children’s wear: The country's high child population, and the increased awareness of parents in terms of baby and child care, continues to have a positive impact on children's clothing. Increasing awareness and sensitivity in childcare and

baby care increases the demand for high quality clothing and is expected to further increase demand for branded quality products. As a result of further investment in the new outlet openings and increasing number of shopping centers, distribution continues to shift from unofficial to organized retailer. Social media encourages many parents to document and share the pictures of their children, encouraging a focus on image and style for children. There are also many popular blogs focusing on children's fashion. This focus on children's image is also encouraged by journals, newspapers and online media that provide coverage for celebrities' children. Social media is expected to continue to shape trends in children's clothing. Children are likely to become aware of fashion trends at a younger age, and therefore will have an increasing impact on purchasing decisions.

- Women’s wear: The increase in the number of working women living in big urban centers continues to increase the demand for women's work clothes. Moreover, the sensitivity of young urban women to the latest trends and the increasing range of products by leading companies continue to improve the performance of women's underwear. Women's clothing is expected to continue to show a positive performance due to the expected increase in women's employment, which will have a positive impact on women's disposable revenues. Depending on more internet usage, consumers' awareness of the latest fashion trends will further support the predicted performance of women's clothing.

- Men’s wear: The personal appearance among Turkish men becomes even more important; moreover, it is increasingly seen as an element of identity among men who progress in their careers and live in big urban centers. This trend extends to other industries, such as beauty and personal care, and allows more attention to the appearance of male consumers. Moreover, social media sites like Facebook and Instagram have a significant impact on men who want to have a fashionable look. Men are expected to go more and more into everyday styles for both work and socialization. Men often see shopping in physical stores as time consuming. In parallel with high percentage of smartphone ownership in Turkey, more and more consumers use smartphones to shop mobile. More apparel companies are expected to offer websites optimized for mobile to facilitate this process, and men's apparel sales via mobile are set to increase strongly. Due to the increased awareness and preference of online shopping, an increasing number of companies are expected to

invest more in online stores. Investment in online stores and multi-channel retailing will be the main strategies for companies that will increase their online value sales and this will lead to decline in brick and mortar stores.

- Footwear: With the increasing penetration of chain apparel and footwear specialist retailers, the transition from unregistered and unbranded footwear to branded footwear is continuing and this will have a positive effect on the overall performance of the footwear. Sales growth will take place with more women in the workplace and expansion of the middle class. Branded footwear will benefit from the opening of new shopping centers. Introducing online stores and providing more convenience and better customer service on existing platforms will also be the key to success in footwear. The availability of advanced medicines and treatment methods increases global life expectancy. Demand for medical and therapeutic footwear such as shoes with extra-depth shoes and shoes suitable for medical professions is expected to increase. Because style continues to be an important buying factor, medical and therapeutic shoe manufacturers are expected to add more design and fashion elements to appeal to female consumers

- Sportswear: The category of sportswear has a good value increase due to the increasing interest in sports. Football and basketball continue to be the most popular sports in Turkey. The jersey sales of the top three football clubs constitute the category income. The involvement of many Turkish basketball players in the NBA increases the interest in basketball in the country. In addition to the international achievements of the national football team in European Championship and in the World Cup, the exposure of Turkish consumers to important sporting events, such as the Istanbul leg of the Women's Tennis Association and the Adidas Istanbul Basketball Cup, increases the interest in sports. Sponsoring to tournaments and organizing events related to brands will be key opportunities.

- Accessories: Hats are not only fashionable products, they are also purchased for sports activities, including running and cycling. However, due to global warming, categories such as hats and gloves are expected to perform below average in fixed value sales conditions. Consumers are expected to adapt to changing climates and will do more research for clothing accessories that exceed the seasons, and will invest less in winter-related items, including hats. Reduced prices and discounts will always be welcomed and lower-priced products will be preferred compared to those

with higher unit prices, which may preserve sales volume, but will prevent value sales.

3.2 Past and Today of Apparel Industry by Figures

According to the report of Turkish Employers Association of Textile Industry, when historical process of apparel industry in Turkey is overviewed, the first weaving factory was established in 1835 in Feshane, Istanbul. Immediately after the establishment of the Republic of Turkey, in order to ensure the dynamisim of the economy and industrialization in the country, Sümerbank in 1926 established factories in the textile sector as in other sectors. The textile and apparel sector, which has become increasingly popular with textile factories since the mid-1950s, has met the domestic demand very much and has begun to turn to export. Then, within the framework of the first (1963-1967) and second (1968-1972) five-year development plans prepared by the State Planning Organization, incentives for the improvement of the textile and apparel sector were introduced. In this context, from the year 1980 until the 2000s, the textile and apparel sector has continued to play an important role in Turkey's economy and increased its share of exports in these years.

According to World Trade Organization's international trade statistics 2000, while Turkey's share in world exports of apparel in 1980 was 0.3%, it has risen to 3.5% in 1999. Turkey's share in world exports of apparel in 2017 is 3.3% according to World Trade Organization's world trade statistical review 2018 report.

In the meantime, according to apparel and footwear in Turkey report by Euromonitor International in 2018, while sales volume of apparel in Turkey in 2012 was 1 billion 500 thousand units, in 2017 it has become 1 billion 74 million 100 thousand units. Hereby, volume growth of apparel in Turkey, from 2012 to 2017 is 7.4%. Besides, while sales value of apparel in Turkey in 2012 was 32 billion 479 million 900 thousand Turkish liras, in 2017 it has become 58 billion 132 million 800 thousand Turkish liras. Hereby, value growth of apparel in Turkey, from 2012 to 2017 is 79.0%.

In 2018, LC Waikiki maintained its leading position in the apparel market in Turkey. At the end of 2017, Koton was in the third place behind Defacto while at the end of

2018, Koton moved to second place and became the market challenger of LC Waikiki.

The market shares of the top 5 brands in apparel industry in Turkey in 2018 are given month by month in Table 3.1.

Table 3.1 : Market shares of the top 5 brands in apparel industry in Turkey in 2018.

Month	LC Waikiki	Koton	Defacto	Mavi	H&M
January	22.9	3.2	3.0	0.7	0.5
February	20.7	3.2	3.1	0.7	0.6
March	20.6	3.7	3.0	0.5	0.4
April	22.1	3.1	3.0	0.9	0.6
May	22.7	3.2	3.1	0.7	0.9
June	26.0	3.4	3.9	1.1	0.8
July	24.0	4.0	3.4	1.0	0.8
August	23.8	4.4	4.7	0.9	0.6
September	17.9	3.5	3.9	0.7	0.6
October	20.5	4.3	3.4	0.6	0.7
November	20.3	3.8	3.3	1.0	0.6
December	20.2	3.5	3.3	1.1	0.5

Note: All values are given in percentages.

Source: LC Waikiki. (2019). Pazar Performans Göstergeleri Raporu Şubat 2019.

LC Waikiki was founded in 1988 in France. Since 1997, it has been serving as a Turkish brand. In 2009, LC Waikiki took the first step of foreign investments in Romania. Today, LC Waikiki serves in 922 stores in 45 countries. On the other hand, Koton was also founded in 1988. In addition, Koton's first foreign store was opened in 1996 in Munich. Today, Koton serves in 486 stores, 193 of which are abroad.

4. MEDIA TRANSFORMATION AND SOCIAL MEDIA MARKETING

4.1 New Media Investments and Consumptions

The media sector is also getting its share from the digitalizing world. In the digitalized world, digital media is the new channel for media planning which was previously consisting of television, radio, cinema, newspaper, magazine, and outdoor. Advertisers are moving important budgets to online platforms from offline platforms (Evens, 2018). More and more ads are being moved to digital platforms such as digital outdoor, mobile, desktop or IP broadcast TV (Denford, 2018).

According to estimated media and advertising investments annual report prepared by Deloitte and Advertisers Association in 2019, as of 2017, digital media investments in the world have been the most important channel for the first time in front of all other media. In 2018, it increased its share in total media investments more rapidly than other channels. While the total media investment in the world was 556 billion dollars in 2017, this amount increased to 581 billion dollars in 2018. In 2018, 41% of the total media investments, which are estimated to grow 4.5% worldwide, are made to digital media, while digital growth is mainly obtained from print media and television.

In the year 2017 the total media investment in Turkey was 8 billion 20 million Turkish liras, while this amount increased to 8 billion 252 million Turkish liras in the year 2018. The total media investments in Turkey increased by 2.9% compared to the previous year. In 2018, digital channel expenditures increased by 14.8% compared to the previous year, while the share of digital channels among all channels increased to 28.9%.

In Table 4.1 shares of media channels in 2015 and in 2018 both in Turkey and worldwide can be seen.

Table 4.1 : Shares of media channels in 2015 and in 2018 both in Turkey and worldwide.

Channel	Worldwide			Turkey		
	2015	2018	Change in share (pp)	2015	2018	Change in share (pp)
Television	36%	33%	-3	51%	47%	-4
Digital	30%	41%	11	23%	29%	6
Print media	19%	13%	-6	17%	10%	-7
Out-of-home	7%	6%	-1	6%	10%	4
Radio	7%	6%	-1	2%	3%	1
Cinema	1%	1%	0	1%	1%	0

Note: pp refers to percentage points.

Source: Reklamcılar Derneği., Deloitte. (2019). Türkiye'de Tahmini Medya ve Reklam Yatırımları 2018 yılsonu raporu.

As can be seen from the table, the share of digital channel usage in media investments has increased significantly in the last 3 years. In addition, according to World Advertising Research Center global ad trends report in February 2019, mobile increased its share of global media investment by 4 percentage points to 23% in 2018. According to mobile ad spending research in 2018 by Mobile Marketing Association Turkey and Kantar Media, in Turkey as well mobile increased its share of total media investment by 3 percentage points to 18% in 2018. Social media investment also increased its share of total media investment by 1 percentage point to 5% in 2018.

Media consumption is also similarly transforming as media investments. The results of media consumption research conducted by Kantar Media lastly in February 2018 in Turkey can be seen in Table 4.2.

Table 4.2 : Media consumption by Turkish consumers from 2015 to 2018.

Channel	2015	2016	2017	2018
Television	93	95	93	90
Out-of-home	72	72	65	60
Newspaper	67	57	46	44
Magazine	12	10	6	6
Radio	35	25	20	17
Cinema	19	20	21	24
Internet	32	40	46	53
Mobile Internet	22	30	45	53

Note: All values are given in percentages.

Source: Kantar Media. (2018). Turkey Target Group Index 2018r1, 2017r1, 2016r1, 2015r1.

As can be seen from the table, while television is still the strongest channel, internet and mobile internet consumption is increasing over the last 3 years. On the other hand, consumption of newspapers and magazines is decreasing.

4.2 Social Media Marketing Tools and Related Figures

The Internet and online-based social media have changed consumer consumption habits by providing consumers with new ways of looking for, assessing, choosing, and buying goods and services (Albors et al., 2008). Therefore, companies had to engage in digital marketing activities along with traditional marketing activities.

The Institute of Direct and Digital Marketing defines digital marketing as follows:

Applying digital technologies which form online channels to market to contribute to marketing activities aimed at achieving profitable acquisition and retention of customers through recognizing the strategic importance of digital technologies and developing a planned approach to improve customer knowledge (of their profiles, behavior, value and loyalty drivers), then delivering integrated targeted communications and online services that match their individual needs.

Digital marketing tools are divided into six main groups (Chaffey and Smith, 2008):

- Search engine marketing: Search engine marketing is to place messages in the search engine to encourage the user to click on the website when a particular keyword phrase is typed. Two key search marketing techniques are pay-per-click payouts or sponsored links, and placements on natural or organic listings that use search engine optimization at no charge for clicks from the search engine.

- Online PR: Online public relations is to maximize the positive words of companies, brands, products, or websites on social media networks, blogs, podcasts, or third party websites that are likely to be visited by the audience. It also includes responding to negative words and public relations through a site, for example, through a social media news center or a blog.

- Online partnerships: Online partnerships are to create and manage long-term regulations to promote online services through third-party websites or email communications. Link building, affiliate marketing, price comparison sites, online sponsorship and co-branding are examples of online partnerships.

• Display advertising: Display advertising is to use online ads such as banners and rich media ads to ensure brand awareness and promote clicks on a target site.

• Opt-in email marketing: Opt-in e-mail marketing is to rent e-mail lists or place advertisements into third-party e-newsletters, or to use an in-house listing for customer activation and retention.

• Social media marketing: Companies do advertising in social networks and communities to reach out to their audience and attract their attention. Viral marketing or online word-of-mouth messages are closely related to this. Here, content is shared or messages are forwarded to gain awareness and in some cases to drive responses.

Chaffey and Ellis-Chaddwick (2016) examined social media marketing tools in ten main groups.

• Social networks: Social networking sites are web-based services that enable individuals to create a public or semi-public profile on a limited system, add a list of other users to whom they share their links, and view and traverse their list of connections (Boyd and Ellison, 2007). Examples to social networking sites are Facebook, LinkedIn, Instagram, Twitter and Snapchat.

• Social publishing and news: Social publishing and news are almost all newspapers and magazines, whether they are large or niche and now have an online presence with the option to join articles, blogs, or comments about communities.

• Social commenting in blogs: A company blog can be the center of social media strategy.

• Social niche communities: Although social niche communities support subgroups, they are communities and forums independent of the main networks.

• Social customer service: Social customer services are sites such as companies' own customer support forums and are becoming increasingly important in responding to customer complaints.

• Social knowledge: These are reference social networks like Yahoo!, Answers, Quora, and Wikipedia.

• Social bookmarking: The purpose of social bookmarking is to store and archive acclaimed content in social media. If a company's site or any subject on the

site is published and archived on the necessary bookmarking sites, it will provide a power to the site in terms of authority and SEO.

Research made by We Are Social in partnership with Hootsuite investigates digital around the world in 2019. The some important results of the survey are as follows:

- According to the research results, 56% of the world's population is urbanized while this rate in Turkey is 75%.
- The unique mobile subscriber rate in the world is 67% while this rate in Turkey is 93%.
- The rate of internet users in the world is 57% while this rate in Turkey is 72%.
- The rate of active social media users in the world is 45% while this rate in Turkey is 63%.
- The rate of mobile social media users in the world is 42% while this rate in Turkey is 53% kind in Turkey.

According to results of the research, it is seen that digital consumption in Turkey is over global average. Another result of the research is that in Turkey most active social media platform is YouTube while Instagram and Facebook are following YouTube respectively. Social media audience profile in Turkey was also investigated in the research. According to results the most crowded age group of social media audience is 25-34 with the rate of 33% while 35-44 age group is following with the rate of 25% and third most crowded age group is 18-24 with the rate of 24%. Thus, in terms of age, 18-44 age group is the main social media audience in Turkey. One of the most noticeable results of the research is that Turkey is the global leader in terms of Instagram’s addressable advertising audience, compared to population aged more than 13 with the percentage of 58% where worldwide average is only 15%.

5. CONTENT ANALYSIS

5.1 Definition, Types and Components

Content analysis is a research technique for making reproducible and valid inferences from texts (or other meaningful material) to context of use (Krippendorff, 2004). According to Holsti (1969) content analysis is "any technique for making inferences by objectively and systematically identifying specified characteristics of messages" (p.14). Neuendorf (2002) makes a broader definition of content analysis as "Content analysis is a summarizing, quantitative analysis of messages that relies on the scientific method (including attention to objectivity-intersubjectivity, a priori design, reliability, validity, generalizability, replicability, and hypothesis testing) and is not limited as to the types of variables that may be measured or the context in which the messages are created or presented" (p.10). For the purpose of consumer research, content analysis is defined as the method of analysis of communication messages using a systematic system of counting the items in the specified categories (Sayre, 1992).

Content analysis is applicable to many areas of inquiry, with examples ranging from investigating the degree of gender stereotyping in selfies (Döring et al, 2016) to exploring images' role in presidential political marketing (Munoz and Towner, 2017) and from examining food advertisements directed towards parents in parenting and family magazines (Manganello et al, 2012) to determining if companies targeting women differ than the companies targeting the general population in terms of social media strategies (Hassan, 2014). The fields of application of content analysis are available in many areas from sociology to politics, and from public health to advertising. The field of application in this paper will be in the apparel industry through marketing and advertising. Therefore, it is necessary to define content analysis from the perspective of advertising.

Content analysis from a marketing and advertising perspective is a systematic, objective and quantitative analysis of an advertising application model or the advertising that is carried out to identify the elements of advertising strategies of

brands, such as brand positioning, sales offer, and creative tone. Academically, content analysis is done to identify trends in practice and the general relationships between ad features and advertising effects.

Neuendorf (2002) categorizes content analysis into four groups as descriptive, inferential, psychometric, and predictive:

- Descriptive content analysis: In terms of media content analysis, the first and basic role of descriptive content analysis is to provide insight into the discourse and messages and images in the popular culture represented in the mass media.

- Inferential content analysis: The inferential role of content analysis, rather than being precise, is facilitator, but allows researchers to go further and discover what media content says about a society.

- Psychometric content analysis: This method aims to provide the individual with a clinical diagnosis by means of the analysis of messages produced by that individual or to measure a psychological feature or condition by message analysis.

- Predictive content analysis: Such content analysis, as its primary objective, provides an estimate of a result or effect of the examined messages. By measuring the basic characteristics of messages, the researcher aims to estimate the responses of the receiver or audience to the messages.

Krippendorff (2004) examines the components of content analysis in six titles:

- Unitizing: Unitization is the systematic separation of text, image, sound and other observable parts of an analysis.

- Sampling: Sampling allows the analyst to economize research efforts by reducing observations to a manageable sub-group. This subset represents all the possible set of units, the population or universe of interest, statistically or conceptually.

- Coding: The coding closes the gap between the unitized text and someone's reading of them. One reason for this analytical component is the need for researchers to create permanent records of temporary events such as oral words or passing images. Once such phenomena have been coded, analysts can compare them over time, apply different methods to them, and multiply the analysis of other different researchers. The second reason for coding is that content analysts need to convert

non-edited text, original images, and/or unstructured sounds into analyzable impressions.

- Reducing: Reducing the data meets the need of analysts for efficient representations, especially of large volumes of data. A type/token statistic is a more effective representation than a tabulation of all occurrences. It only replaces the copies by a frequency. Since a representation can be created from the other, nothing is lost.

- Inferring: Extracting the contextual phenomena from the texts carries an analysis outside the data. It fills the gap between the explanatory accounts of the texts and what they mean. It refers to events that are not observed in the context of the analyst. Abduction inferences, unlike deductive or inductive ones, require warranty that can be backed by evidence. In the content analysis, such warranties are provided by analytical structures supported by everything known to the content. Abduction inferences distinguish content analysis from other query modes.

- Narrating: Explaining the answers to the questions of content analysts makes the results of the researchers understandable to others. Sometimes this means explaining the practical significance of the findings or their contribution to the current literature. At other times, it means discussing the appropriateness of the use of content analysis rather than direct observational techniques. Describing the results of a content analysis is a process by which analysts believe that they share with the audience or with the beneficiaries of the research.

5.2 Content Analysis in Communication and Branding

When researches in the literature are examined, it has been observed that researchers conducted content analysis studies on traditional and digital media with different problem definitions and different fields of application.

Sayre (1992), exemplified a case study in which a small California fragrance company conducted a content analysis of the magazine advertisements in order to find answers to the question of what is the most effective visual presentation for the product aimed at the target audience which is the sophisticated urban adults. Nelson and Paek (2007), made a content analysis of local editions of a magazine owned by an international media brand in order to understand global advertising strategies of

the brand. In another research, food advertisements directed towards parents in parenting and family magazines were examined in order to understand effects of advertisements on childhood obesity in the USA (Manganello et al, 2012). In order to understand effects of food advertising on popularity of consumption of certain types of food Roose et al. (2018) conducted a content analysis of Belgian food magazine advertisements. Although each of these content analyses were conducted through magazines, the application areas differed from each other such as retail marketing, public health, perfume and fragrance industry, and media industry. Researches have also served many purposes, from researching brands' strategies to researching the impact of advertising on public health, and from trying to predict the most efficient advertising to reach the target audience to determining the advertising's informative and transformational aspects.

In the digitalized world, digital channels, especially social media platforms, have found their place in content analysis in the literature. Ashley and Tuten (2015), conducted a content analysis in order to analyze creative strategies in the social media content shared by a sample of top brands. In another research, Instagram posts of five brands that target women were examined in order to understand if companies that target women use a different social media strategy than companies that target the general population (Hassan, 2014). Döring et al. (2016) investigated the degree of gender stereotyping in selfies on Instagram. Vassallo et al. (2018) made a content analysis with the aim of investigating the frequency images and videos posted by the most popular, energy-dense, nutrient-poor food and beverage brands on Instagram and the marketing strategies used in these images. Content analysis made on social networking platforms served to several purposes, from researching own dynamics of social media platforms to examining how brands utilize from these social media platforms.

When the content analysis studies conducted in the literature are examined, content analysis in traditional press and content analysis in digital platforms are similar, but there are also points where they differ from each other due to their own dynamics.

Examples of similar aspects include reviewing the advertising strategies of brands, examining the impact of advertisements on different areas such as public health, and reviewing the advertising content for brands to better reach their target audience.

On the other hand, while it is possible to examine the behavior of the channel consumers by examining the user-generated content on digital platforms, this is not possible in the traditional press. Content analysis in traditional press and digital platform is different in this respect.

In Table 5.1 a sample of previous studies on content analysis can be seen in detail.

Table 5.1 : A sample of previous studies on content analysis.

Author	Source	Subjects	Methodology	Important Results
Sayre (1992)	Journal of Consumer Marketing	Perfume ads in twelve consecutive issues of four magazines	Descriptive statistics	Use of magic as romance was a successful technique for reaching target audience
Nelson and Paek (2007)	International Marketing Review	Advertisements in local editions of Cosmopolitan magazine	Descriptive statistics	Multinational product ads tend to use standardized strategies and tactics more than domestic product ads.
Manganello et al. (2012)	Public Health Nutrition	Food ads in parenting and family magazines	Descriptive statistics Bivariate analysis Chi-square test of independence	Most frequently used sales theme was taste. Over half of products advertised were products of poor nutritional quality.
Hassan (2014)	Marketing Management Association	Instagram posts of five brands that target women	Descriptive statistics	There is more variability in the use of strategies of brands that target women than those for the general population

Table 5.1 (continued) : A sample of previous studies on content analysis.

Author	Source	Subjects	Methodology	Important Results
Ashley and Tuten (2015)	Psychology & Marketing	Social media content of top brands	Descriptive statistics	Experiential, image and exclusivity messages were associated with customer engagement
Döring et al. (2016)	Computers in Human Behavior	Selfie posts of an equal number of females and males on Instagram	Descriptive statistics	The biggest gender differences were found for the kissing pout and muscle presentation.
Roose et. al (2018)	British Food Journal	Western European food advertisements published in Belgian food magazines	Factor analysis with Varimax rotation Repeated measures ANOVA MANOVA	Healthy food ads in Belgium are mainly informational, whereas unhealthy food ads are mainly transformational.
Vassallo et. al (2018)	JMIR Public Health and Surveillance	15 EDNP food and beverage accounts on Instagram	Descriptive statistics	There was a high level of branding, and there were very few health claims

6. RESEARCH DESIGN

6.1 Aim and Scope of the Research

As mentioned in the previous sections apparel industry continues to grow at a healthy rate in Turkey and worldwide according to apparel and footwear in Turkey report by Euromonitor International in 2018. Since, international firms are increasing their presence in local markets, new firms are entering into local markets, and apparel is consumed faster, the competition is growing. Companies are reviewing their business strategies in a market where competition is so high, and they have to implement their marketing strategies in the most efficient way. One of the sectors that the digitalized world has transformed significantly is the media sector according to estimated media and advertising investments annual report prepared by Deloitte and Advertisers Association in 2019. Companies have to develop marketing strategies in digital media with the shift of advertising activities from traditional media to digital media. With the increasing use of social networks by the consumers, companies use some of their marketing budgets in these channels. A lot of content is produced in social networks every day. The efficiency of the produced content in reaching the target audience of the companies is gaining importance. For this reason, analyzing the content of the companies produced in social media is important for understanding the marketing strategies of companies in social platforms. Since in Turkey, Instagram is the second most active platform following YouTube, and Turkey is the global leader in terms of Instagram's addressable advertising audience, compared to population aged more than 13, according to Global Digital Report 2019 prepared by We Are Social in partnership with Hootsuite, understanding how companies targeting consumers in Turkey use Instagram in terms of marketing activities is gaining importance.

In the light of all these developments, in this paper, content analysis of Instagram posts of LC Waikiki, apparel industry leader in Turkey at the end of 2018, and of Koton, LC Waikiki's challenger, was conducted. With the content analysis conducted, how the two brands use Instagram, how they differ from each other, and

how their content differ according to seasons were examined in terms of marketing strategies and other descriptive data such as gender, background, product type and so on.

6.2 Data Preperation and Sampling

The data consisted of the posts that LC Waikiki and Koton shared on Instagram for 1 year period. The period of one year was selected as from March 1, 2018, to March 1, 2019, in order to examine seasonality as well. During this 1-year period LC Waikiki shared 583 posts while Koton shared 706 posts. A total of 1289 posts were posted by two brands. There were 4 types of posts on Instagram during this study:

- Standard post: Posting still images
- Repost: Posting a photo from someone else's account to own account
- Moving images: Posting videos and gifs
- Carousel: Posting multiple (up to ten) still images and/or moving images in one post

In this paper, content analysis of standard posts was conducted. After extracting posts that are not standard posts, 401 posts of LC Waikiki, and 523 posts of Koton remained. Therefore, content analysis of total 924 posts was conducted in this paper.

6.3 Establishing the Codebook

In order to code every post in the sample, a codebook had to be established. Codebooks in previously published works were examined in order to establish the codebook. Kite et al. (2016) specified their coding in two main categories that are communication techniques and marketing elements. On the other hand, Vassallo et al. (2018) established their coding guide in four categories that are informational content, original content, health claims, and marketing strategies. While establishing the codebook, the dynamics of researched sector, and the structure of the media channel where the content analysis will be conducted were taken into consideration along with previously published works. During coding the posts in the sample, new coding categories were added to codebook, and final codebook was established. Codebook in this paper consisted of two main categories:

• Marketing strategy: Including marketing strategies such as corporate social responsibility, celebrity or influencer endorsement, unbranded product imagery etc.

• Other descriptive data: Including descriptive data such as gender, background, product type etc.

In the final codebook, there were 41 subcategories, 12 of which were subcategories of marketing strategy, and 29 of which were subcategories of other descriptive data. In Figure 6.1 final codebook, and In Table 6.1 marketing strategy subcategories of codebook and their definitions are given.

Total Post No	1	2	3	399	400	401	402	403	404	922	923	924
Brand Post No	1	2	3	399	400	401	1	2	3	521	522	523
Brand	LC Waikiki	LC Waikiki	LC Waikiki	LC Waikiki	LC Waikiki	LC Waikiki	Koton	Koton	Koton	Koton	Koton	Koton
Season	Spring	Spring	Spring	Winter	Winter	Winter	Spring	Spring	Spring	Winter	Winter	Winter
Subcategories	**1 or 0**	**1 or 0**	**1 or 0**	**1 or 0**	**1 or 0**	**1 or 0**	**1 or 0**	**1 or 0**	**1 or 0**	**1 or 0**	**1 or 0**	**1 or 0**
Corporate social responsibility	0	0	0	0	0	0	0	0	0	0	0	0
Celebrity of influencer endorsement	0	0	0	0	0	0	0	0	0	1	1	1
Price promotions	0	0	0	0	0	0	0	0	0	0	0	0
Special deals	0	0	0	0	0	0	0	0	0	0	0	0
Children-related content	0	0	0	0	0	0	0	0	0	0	0	0
Partnership or sponsorship	0	0	0	0	0	0	0	0	0	0	0	0
Brand elements	0	0	0	0	0	0	0	0	0	0	0	0
Product imagery without brand elements	1	1	1	1	1	1	1	1	1	1	1	1
Competition	0	0	0	0	0	0	0	0	0	0	0	0
Product placement in TV series	0	0	0	0	0	0	0	0	0	0	0	0
Product price	0	0	0	0	0	0	0	0	0	0	0	0
Image without a clear marketing strategy	0	0	0	0	0	0	0	0	0	0	0	0
Real people in post	1	1	1	0	0	0	1	1	1	1	1	1
Gender of people in post (female)	1	0	1	0	0	0	1	1	1	1	1	1
Gender of people in post (male)	0	1	0	0	0	0	0	0	0	1	1	1
Children in post	0	0	0	0	0	0	0	0	0	0	0	0
Animal in post	0	0	0	0	0	0	0	0	0	0	0	0
Background of post (indoor)	1	1	1	0	0	0	1	1	1	1	1	1
Background of post (outdoor)	0	0	0	0	0	0	0	0	0	0	0	0
Product type in post (dresses)	0	0	0	1	1	1	0	0	0	0	0	0
Product type in post (tops)	1	1	1	0	0	0	1	1	1	0	0	1
Product type in post (bottoms)	0	0	1	0	0	0	1	0	0	1	1	0
Product type in post (outerwear)	0	1	0	0	0	0	0	0	0	1	1	0
Product type in post (underwear)	0	0	0	0	0	0	0	0	0	0	0	0
Product type in post (homewear)	0	0	0	0	0	0	0	0	0	0	0	0
Product type in post (sportswear)	0	0	0	0	0	0	0	0	0	0	0	0
Product type in post (swimwear)	0	0	0	0	0	0	0	0	0	0	0	0
Product type in post (footwear)	0	0	0	0	0	1	0	0	0	0	1	0
Product type in post (accessories)	0	0	0	0	0	0	0	0	0	0	0	0
Product type in post (home)	0	0	0	0	0	0	0	0	0	0	0	0
Text in post	1	0	0	0	0	0	0	0	0	0	0	0
Logo in post	0	0	0	0	0	0	0	0	0	0	0	0
Slogan in post (fashion)	0	0	0	0	0	0	0	0	0	0	0	0
Slogan in post (women)	0	0	0	0	0	0	0	0	0	0	0	0
Slogan in post (style)	0	0	0	0	0	0	0	0	0	0	0	0
Slogan in post (love)	0	0	0	0	0	0	0	0	0	0	0	0
Slogan in post (back to school)	0	0	0	0	0	0	0	0	0	0	0	0
Slogan in post (collection)	0	0	0	0	0	0	0	0	0	0	0	0
Slogan in post (colors)	0	0	0	0	0	0	0	0	0	0	0	0
Slogan in post (other)	0	0	0	0	0	0	0	0	0	0	0	0
Special day mention in post	1	0	0	0	0	0	0	0	0	0	0	0

Figure 6.1 : Final codebook.

Table 6.1 : Marketing strategy subcategories and their definitions.

Marketing strategy subcategory	Definition
Corporate social responsibility	Ethical or sustainable perspective, or charitable efforts by the brand
Celebrity or influencer endorsement	Involving a well-known person using their fame to help promote the brand
Price promotions	Promoting a product by its relatively low price
Special deals	Offers available to those who engage with posts
Children-related content	Cartoons or characters that include characters from movies, books, TV, and the Internet
Partnership or sponsorship	Events supported by the brand, or other brands with which the brand partners
Brand elements	Elements used to represent and differentiate brands (Logo, slogan and trademark)
Product imagery without brand elements	Pictures of products sold without brand elements
Competition	Any contest involving user participation
Product placement in TV series	Promoting products by appearing in TV series
Product price	Demonstrating exact price of the product
Image without a clear marketing strategy	Image not associated with any other marketing strategy

Other descriptive data subcategories are given below:

- Real people in post
- Gender of people in post: Female / Male
- Children in post
- Animal in post
- Background of post: Indoor / Outdoor
- Product type in post: Dresses / Tops / Bottoms / Outerwear / Underwear / Homewear / Sportswear / Swimwear / Footwear / Accessories / Home
- Text in post
- Logo in post
- Slogan in post: Fashion / Women / Style / Love / Back to School / Collection / Colors / Other
- Special day mention in post

6.4 Coding the Posts and Intercoder Reliability

The two coders independently coded all 924 posts. Coders coded posts by all categories they contain. If, according to a coder, a subcategory exists in the post, coder coded the subcategory as "1" for that post. If a subcategory does not exist in the post, then coder coded the subcategory as "0" for that post. After completion of coding process intercoder reliability statistics were calculated in IBM SPSS Statistics using Cohen's kappa coefficient. According to Peat (2001), "A kappa above 0.5 indicates moderate agreement, above 0.7 indicates good agreement, and above 0.8 indicates very good agreement" (p. 228). According to results of intercoder reliability statistics, level of agreement of the two coders for every subcategories are very good, except for two subcategories. Agreement level of "product type in post (accessories)" subcategory is good, while no statistics are computed for "corporate social responsibility" subcategory since this particular category was never coded as "1" by both coders. In Table 6.2 intercoder reliability statistics results can be seen for every subcategory.

Table 6.2 : Intercoder reliability statistics results.

Subcategory	Approximate significance	Cohen's kappa	Agreement
Corporate social responsibility	.[a]	.[a]	.[a]
Celebrity or influencer endorsement	< .0005	0.983	Very good
Price promotions	< .0005	0.978	Very good
Special deals	< .0005	1.000	Very good
Children-related content	< .0005	1.000	Very good
Partnership or sponsorship	< .0005	1.000	Very good
Brand elements	< .0005	0.927	Very good
Product imagery without brand elements	< .0005	0.985	Very good
Competition	< .0005	1.000	Very good
Product placement in TV series	< .0005	1.000	Very good
Product price	< .0005	1.000	Very good
Image without a clear marketing strategy	< .0005	0.931	Very good
Real people in post	< .0005	0.954	Very good
Gender of people in post (female)	< .0005	0.983	Very good
Gender of people in post (male)	< .0005	0.978	Very good
Children in post	< .0005	0.979	Very good
Animal in post	< .0005	0.947	Very good
Background of post (indoor)	< .0005	0.954	Very good
Background of post (outdoor)	< .0005	0.945	Very good
Product type in post (dresses)	< .0005	0.896	Very good
Product type in post (tops)	< .0005	0.810	Very good
Product type in post (bottoms)	< .0005	0.834	Very good
Product type in post (outerwear)	< .0005	0.931	Very good
Product type in post (underwear)	< .0005	0.923	Very good
Product type in post (homewear)	< .0005	0.932	Very good
Product type in post (sportswear)	< .0005	0.972	Very good
Product type in post (swimwear)	< .0005	0.873	Very good
Product type in post (footwear)	< .0005	0.804	Very good
Product type in post (accessories)	< .0005	0.770	Good
Product type in post (home)	< .0005	1.000	Very good
Text in post	< .0005	0.960	Very good
Logo in post	< .0005	0.969	Very good
Slogan in post (fashion)	< .0005	1.000	Very good
Slogan in post (women)	< .0005	1.000	Very good
Slogan in post (style)	< .0005	1.000	Very good
Slogan in post (love)	< .0005	1.000	Very good
Slogan in post (back to school)	< .0005	1.000	Very good
Slogan in post (collection)	< .0005	1.000	Very good
Slogan in post (colors)	< .0005	1.000	Very good
Slogan in post (other)	< .0005	1.000	Very good
Special day mention in post	< .0005	0.990	Very good

a. No statistics are computed because "corporate social responsibility" subcategory was never coded as "1" by both coders.

7. ANALYSIS AND FINDINGS

7.1 Implementation

Dataset was run in IBM SPSS Statistics using descriptive statistics. Chi-square test of independence was conducted in order to see if results are statistically significant. Besides, effect sizes were examined. Cohen (1988) explained values of phi coefficient in order to see effect size for 2 by 2 tables as below:

- Small effect=0.10
- Medium effect=0.30
- Large effect=0.50

Gravetter and Wallnau (2012) explained values of Cramer's V in order to see effect size for tables larger than 2 by 2 as below:

- For degrees of freedom equal to 1: small effect=0.10, medium effect=0.30, and large effect=0.50
- For degrees of freedom equal to 2: small effect=0.07, medium effect=0.21, and large effect=0.35
- For degrees of freedom equal to 3: small effect=0.06, medium effect=0.17, and large effect=0.29

At first, it was separately examined that how both brands' content on Instagram differ according to seasons. Detailed statistics of Instagram posts of LC Waikiki considering seasonality can be seen in Table 7.1. When the seasonality of Instagram content of LC Waikiki were examined, it was seen that there are significant associations between seasons and marketing strategies which are children-related content ($p<0.05$), partnership or sponsorship ($p<0.05$), product placement in TV series ($p<0.05$), product imagery without brand elements ($p=0.002$), and brand elements ($p=0.020$). Another important result is that seasonality has a large effect on children-related content marketing strategy ($V=0.324$). In Figure 7.1 a sample of

Instagram post of LC Waikiki, containing marketing strategy of children-related content can be seen.

Figure 7.1 : Sample Instagram post of LC Waikiki containing marketing strategy of children-related content.

All of the posts containing children-related content marketing strategies were shared in autumn months. It can be said that LC Waikiki shared posts containing children-related content market strategy considering that with the beginning of autumn, schools reopens and students turn back to their schools. When the results of product types are examined, it is seen that posts containing images of tops and sportswear product types do not differ according to seasons. On the other hand same thing cannot be said for footwear which is also one of the product types, since seasonality has a large effect on posts containing footwear (V=0.329). 47.5% of posts shared in winter months included images of footwear. When slogans are examined it can be seen that posts containing slogans about women, and fashion are significantly associated with seasons (p=0.010).

Table 7.1 : Statistics of Instagram posts of LC Waikiki considering seasonality.

Subcategory	Spring (N=106) n (%)	Summer (N=92) n (%)	Autumn (N=85) n (%)	Winter (N=118) n (%)	Pearson Chi-Square	Cramer's V Value
Corporate social responsibility	.[a]	.[a]	.[a]	.[a]	.[a]	.[a]
Celebrity or influencer endorsement	10 (9.4)	17 (18.5)	18 (21.2)	14 (11.9)	0.072[b]	0.132
Price promotions	0 (0.0)	1 (1.1)	1 (1.2)	0 (0.0)	0.466[b]	0.080
Special deals	0 (0.0)	0 (0.0)	0 (0.0)	3 (2.5)	0.064[b]	0.134
Children-related content	0 (0.0)	0 (0.0)	11 (12.9)	0 (0.0)	<0.05	0.324
Partnership or sponsorship	0 (0.0)	0 (0.0)	7 (8.2)	0 (0.0)	<0.05	0.257
Brand elements	13 (12.3)	4 (4.3)	8 (9.4)	3 (2.5)	0.020	0.157
Product imagery without brand elements	91 (85.8)	76 (82.6)	78 (91.8)	115 (97.5)	0.002	0.193
Competition	0 (0.0)	5 (5.4)	2 (2.4)	3 (2.5)	0.112[b]	0.122
Product placement in TV series	0 (0.0)	0 (0.0)	6 (7.1)	0 (0.0)	<0.05	0.238
Product price	.[a]	.[a]	.[a]	.[a]	.[a]	.[a]
Image without a clear marketing strategy	3 (2.8)	11 (12.0)	5 (5.9)	1 (0.8)	0.002	0.193
Real people in post	93 (87.7)	75 (81.5)	72 (84.7)	79 (66.9)	0.001	0.209
Gender of people in post (female)	43 (40.6)	43 (46.7)	37 (43.5)	40 (33.9)	0.268[b]	0.099
Gender of people in post (male)	34 (32.1)	20 (21.7)	20 (23.5)	24 (20.3)	0.185[b]	0.110
Children in post	19 (17.9)	23 (25.0)	22 (25.9)	31 (26.3)	0.441[b]	0.082
Animal in post	2 (1.9)	0 (0,0)	0 (0.0)	0 (0.0)	0.133[b]	0.118
Background of post (indoor)	75 (70.8)	61 (66.3)	57 (67.1)	66 (55.9)	0.113[b]	0.122
Background of post (outdoor)	15 (14.2)	11 (12.0)	5 (5.9)	13 (11.0)	0.328[b]	0.093
Product type in post (dresses)	23 (21.7)	17 (18.5)	5 (5.9)	8 (6.8)	0.001	0.207
Product type in post (tops)	47 (44.3)	54 (58.7)	51 (60.0)	63 (53.4)	0.111[b]	0.123
Product type in post (bottoms)	36 (34.0)	36 (39.1)	46 (54.1)	69 (58.5)	0.001	0.209
Product type in post (outerwear)	25 (23.6)	12 (13.0)	23 (27.1)	36 (30.5)	0.026	0.152
Product type in post (underwear)	.[a]	.[a]	.[a]	.[a]	.[a]	.[a]
Product type in post (homewear)	0 (0.0)	3 (3.3)	3 (3.5)	13 (11.0)	0.001	0.202

Table 7.1 (continued) : Statistics of Instagram posts of LC Waikiki considering seasonality.

Subcategory	Spring (N=106) n (%)	Summer (N=92) n (%)	Autumn (N=85) n (%)	Winter (N=118) n (%)	Pearson Chi-Square	Cramer's V Value
Product type in post (sportswear)	6 (5.7)	0 (0.0)	3 (3.5)	3 (2.5)	0.133[b]	0.118
Product type in post (swimwear)	.[a]	.[a]	.[a]	.[a]	.[a]	.[a]
Product type in post (footwear)	11 (10.4)	17 (18.5)	26 (30.6)	56 (47.5)	<0.05	0.329
Product type in post (accessories)	2 (1.9)	6 (6.5)	21 (24.7)	25 (21.2)	<0.05	0.279
Product type in post (home)	0 (0.0)	0 (0.0)	1 (1.2)	5 (4.2)	0.028	0.150
Text in post	21 (19.8)	19 (20.7)	22 (25.9)	8 (6.8)	0.002	0.191
Logo in post	1 (0.9)	3 (3.3)	1 (1.2)	0 (0.0)	0.203[b]	0.107
Slogan in post (fashion)	7 (6.6)	3 (3.3)	5 (5.9)	0 (0.0)	0.043	0.142
Slogan in post (women)	4 (3.8)	0 (0.0)	0 (0.0)	0 (0.0)	0.010	0.167
Slogan in post (style)	0 (0.0)	0 (0.0)	0 (0.0)	1 (0.8)	0.493[b]	0.077
Slogan in post (love)	.[a]	.[a]	.[a]	.[a]	.[a]	.[a]
Slogan in post (back to school)	0 (0.0)	2 (2.2)	2 (2.4)	0 (0.0)	0.163[b]	0.113
Slogan in post (collection)	0 (0.0)	0 (0.0)	0 (0.0)	1 (0.8)	0.493[b]	0.077
Slogan in post (colors)	.[a]	.[a]	.[a]	.[a]	.[a]	.[a]
Slogan in post (other)	0 (0.0)	0 (0.0)	0 (0.0)	1 (0.8)	0.493[b]	0.077
Special day mention in post	4 (3.8)	4 (4.3)	3 (3.5)	2 (1.7)	0.711[b]	0.059

a. No statistics are computed because concerned subcategories were never coded as "1".

b. Statistically not significant since asymptotic significance (2-sided) value is larger than 0.05.

Detailed statistics of Instagram posts of Koton considering seasonality can be seen in Table 7.2. When the seasonality of Instagram content of LC Waikiki were examined, it was seen that there are significant associations between seasons and marketing strategies which are celebrity or influencer endorsement (p=0.001), product imagery without brand elements (p=0.005), price promotions (p=0.007), partnership or sponsorship (p=0.014), and brand elements (p=0.040). On the other hand, seasonality doesn't have a large effect on any marketing strategies contained on Instagram posts of Koton.

Seasonality has the largest effect on Instagram posts containing images of outerwear product type (V=0.340). Koton shares posts containing outerwear product type mostly in autumn (34.5%), and in winter (42.7%). Product types that are not significantly associated with seasonality are homewear, footwear, and accessories. Background of the post both indoor and outdoor are significantly associated with seasonality. Special day mention in post also significantly associated with seasonality. In Figure 7.2 a sample of Instagram post of Koton, containing subcategory of special day mention in post can be seen.

Figure 7.2 : Sample Instagram post of Koton containing subcategory of special day mention in post.

Table 7.2 : Statistics of Instagram posts of Koton considering seasonality.

Subcategory	Spring (N=140) n (%)	Summer (N=153) n (%)	Autumn (N=113) n (%)	Winter (N=117) n (%)	Pearson Chi-Square	Cramer's V Value
Corporate social responsibility	.[a]	.[a]	.[a]	.[a]	.[a]	.[a]
Celebrity or influencer endorsement	23 (16.4)	10 (6.5)	27 (23.9)	19 (16.2)	0.001	0.174
Price promotions	0 (0.0)	7 (4.6)	10 (8.8)	5 (4.3)	0.007	0.153
Special deals	1 (0.7)	0 (0.0)	0 (0.0)	0 (0.0)	0.433[b]	0.072
Children-related content	.[a]	.[a]	.[a]	.[a]	.[a]	.[a]
Partnership or sponsorship	4 (2.9)	0 (0.0)	5 (4.4)	0 (0.0)	0.014	0.143
Brand elements	6 (4.3)	11 (7.2)	15 (13.3)	14 (12.0)	0.040	0.126
Product imagery without brand elements	125 (89.3)	148 (96.7)	103 (91.2)	115 (98.3)	0.005	0.156
Competition	.[a]	.[a]	.[a]	.[a]	.[a]	.[a]
Product placement in TV series	.[a]	.[a]	.[a]	.[a]	.[a]	.[a]
Product price	0 (0.0)	1 (0.7)	2 (1.8)	0 (0.0)	0.227[b]	0.091
Image without a clear marketing strategy	9 (6.4)	2 (1.3)	0 (0.0)	0 (0.0)	<0.05	0.186
Real people in post	120 (85.7)	144 (94.1)	100 (88.5)	102 (87.2)	0.107[b]	0.108
Gender of people in post (female)	84 (60.0)	80 (52.3)	86 (76.1)	76 (65.0)	0.001	0.177
Gender of people in post (male)	10 (7.1)	28 (18.3)	30 (26.5)	35 (29.9)	<0.05	0.220
Children in post	31 (22.1)	44 (28.8)	0 (0.0)	15 (12.8)	<0.05	0.283
Animal in post	2 (1.4)	5 (3.3)	1 (0.9)	0 (0.0)	0.157[b]	0.100
Background of post (indoor)	111 (79.3)	113 (73.9)	57 (50.4)	73 (62.4)	<0.05	0.232
Background of post (outdoor)	8 (5.7)	30 (19.6)	42 (37.2)	32 (27.4)	<0.05	0.276
Product type in post (dresses)	39 (27.9)	41 (26.8)	12 (10.6)	15 (12.8)	<0.05	0.193
Product type in post (tops)	46 (32.9)	99 (64.7)	48 (42.5)	45 (38.5)	<0.05	0.257
Product type in post (bottoms)	49 (35.0)	97 (63.4)	49 (43.4)	58 (49.6)	<0.05	0.219
Product type in post (outerwear)	21 (15.0)	11 (7.2)	39 (34.5)	50 (42.7)	<0.05	0.340
Product type in post (underwear)	0 (0.0)	0 (0.0)	3 (2.7)	4 (3.4)	0.026	0.133
Product type in post (homewear)	0 (0.0)	0 (0.0)	1 (0.9)	3 (2.6)	0.064[b]	0.118

Table 7.2 (continued) : Statistics of Instagram posts of Koton considering seasonality.

Subcategory	Spring (N=140) n (%)	Summer (N=153) n (%)	Autumn (N=113) n (%)	Winter (N=117) n (%)	Pearson Chi-Square Asymptotic significance (2-sided)	Cramer's V Value
Product type in post (sportswear)	8 (5.7)	0 (0.0)	9 (8.0)	12 (10.3)	0.002	0.171
Product type in post (swimwear)	7 (5.0)	10 (6.5)	0 (0.0)	0 (0.0)	0.002	0.166
Product type in post (footwear)	30 (21.4)	37 (24.2)	25 (22.1)	23 (19.7)	0.843[b]	0.040
Product type in post (accessories)	11 (7.9)	11 (7.2)	14 (12.4)	9 (7.7)	0.445[b]	0.071
Product type in post (home)	.[a]	.[a]	.[a]	.[a]	.[a]	.[a]
Text in post	31 (22.1)	32 (20.9)	29 (25.7)	22 (18.8)	0.640[b]	0.057
Logo in post	7 (5.0)	8 (5.2)	8 (7.1)	6 (5.1)	0.884[b]	0.035
Slogan in post (fashion)	0 (0.0)	1 (0.7)	0 (0.0)	0 (0.0)	0.489[b]	0.068
Slogan in post (women)	.[a]	.[a]	.[a]	.[a]	.[a]	.[a]
Slogan in post (style)	0 (0.0)	0 (0.0)	8 (7.1)	3 (2.6)	<0.05	0.196
Slogan in post (love)	0 (0.0)	0 (0.0)	0 (0.0)	5 (4.3)	0.001	0.183
Slogan in post (back to school)	0 (0.0)	3 (2.0)	0 (0.0)	0 (0.0)	0.063[b]	0.118
Slogan in post (collection)	4 (2.9)	0 (0.0)	0 (0.0)	0 (0.0)	0.012	0.145
Slogan in post (colors)	2 (1.4)	0 (0.0)	0 (0.0)	0 (0.0)	0.139[b]	0.102
Slogan in post (other)	0 (0.0)	0 (0.0)	1 (0.9)	1 (0.9)	0.465[b]	0.070
Special day mention in post	16 (11.4)	20 (13.1)	3 (2.7)	0 (0.0)	<0.05	0.211

a. No statistics are computed because concerned subcategories were never coded as "1".

b. Statistically not significant since asymptotic significance (2-sided) value is larger than 0.05.

After analyzing how both brands' content on Instagram differ according to seasons, the second analysis is made in order to understand how LC Waikiki and Koton differ from each other overally in terms of contents created on Instagram. In Table 7.3 two brands' differences in terms of content created on Instagram can be seen. When two brands are examined, it was seen that there are significant associations between brands and marketing strategies which are children-related content ($p<0.05$), competition ($p<0.05$), price promotions ($p<0.05$), product placement in TV series ($p=0.005$), and product imagery without brand elements ($p=0.022$). In Figure 7.3 a sample of Instagram post of LC Waikiki, containing marketing strategy of product placement in TV series can be seen. In Figure 7.4 a sample of Instagram post of Koton, containing marketing strategy of price promotions can be seen.

Figure 7.3 : Sample Instagram post of LC Waikiki containing marketing strategy of product placement in TV series.

Real people in post ($p<0.05$), female gender ($p<0.05$), outdoor background ($p<0.05$), logo in post ($p=0.001$), and children in post ($p=0.015$) are the other categories that have significant associations between LC Waikiki and Koton. Female gender ($phi=0.215$) and outdoor background ($phi=0.138$) also are the categories with the largest effect size within the subcategories, although their effect size in general is only small to medium.

The most shared content category by both brands is a subcategory of marketing strategy that is product imagery without brand elements with the percentages 89.8% and 93.9% representing LC Waikiki and Koton respectively.

Figure 7.4 : Sample Instagram post of Koton containing marketing strategy of price promotions.

Table 7.3 : Statistics of Instagram posts of both brands considering differentiation.

Subcategory	LC Waikiki (N=401) n (%)	Koton (N=523) n (%)	Pearson Chi-Square Asymptotic significance (2-sided)	Phi coefficient
Corporate social responsibility	.[a]	.[a]	.[a]	.[a]
Celebrity or influencer endorsement	59 (14.7)	79 (15.1)	0.868[b]	0.005
Price promotions	2 (0.5)	22 (4.2)	<0.05	0.116
Special deals	3 (0.7)	1 (0.2)	0.201[b]	-0.042
Children-related content	11 (2.7)	0 (0.0)	<0.05	-0.125
Partnership or sponsorship	7 (1.7)	9 (1.7)	0.977[b]	-0.001
Brand elements	28 (7.0)	46 (8.8)	0.314[b]	0.033
Product imagery without brand elements	360 (89.8)	491 (93.9)	0.022	0.075
Competition	10 (2.5)	0 (0.0)	<0.05	-0.119
Product placement in TV series	6 (1.5)	0 (0.0)	0.005	-0.092
Product price	0 (0.0)	3 (0.6)	0.129[b]	0.050
Image without a clear marketing strategy	20 (5.0)	11 (2.1)	0.016	-0.079
Real people in post	319 (79.6)	466 (89.1)	<0.05	0.132
Gender of people in post (female)	163 (40.6)	326 (62.3)	<0.05	0.215
Gender of people in post (male)	98 (24.4)	103 (19.7)	0.083[b]	-0.057
Children in post	95 (23.7)	90 (17.2)	0.015	-0.080
Animal in post	2 (0.5)	8 (1.5)	0.133[b]	0.049
Background of post (indoor)	259 (64.6)	354 (67.7)	0.323[b]	0.032
Background of post (outdoor)	44 (11.0)	112 (21.4)	<0.05	0.138
Product type in post (dresses)	53 (13.2)	107 (20.5)	0.004	0.095
Product type in post (tops)	215 (53.6)	238 (45.5)	0.015	-0.080
Product type in post (bottoms)	187 (46.6)	253 (48.4)	0.599[b]	0.017
Product type in post (outerwear)	96 (23.9)	121 (23.1)	0.775[b]	-0.009

Table 7.3 (continued) : Statistics of Instagram posts of both brands considering differentiation.

Subcategory	LC Waikiki (N=401) n (%)	Koton (N=523) n (%)	Pearson Chi-Square Asymptotic significance (2-sided)	Phi coefficient
Product type in post (underwear)	0 (0.0)	7 (1.3)	0.020	0.077
Product type in post (homewear)	19 (4.7)	4 (0.8)	<0.05	-0.126
Product type in post (sportswear)	12 (3.0)	29 (5.5)	0.062[b]	0.061
Product type in post (swimwear)	0 (0.0)	17 (3.3)	<0.05	0.120
Product type in post (footwear)	110 (27.4)	115 (22.0)	0.056[b]	-0.063
Product type in post (accessories)	54 (13.5)	45 (8.6)	0.018	-0.078
Product type in post (home)	6 (1.5)	0 (0.0)	0.005	-0.092
Text in post	70 (17.5)	114 (21.8)	0.101[b]	0.054
Logo in post	5 (1.2)	29 (5.5)	0.001	0.113
Slogan in post (fashion)	15 (3.7)	1 (0.2)	<0.05	-0.135
Slogan in post (women)	4 (1.0)	0 (0.0)	0.022	-0.075
Slogan in post (style)	1 (0.2)	11 (2.1)	0.014	0.081
Slogan in post (love)	0 (0.0)	5 (1.0)	0.05[b]	0.065
Slogan in post (back to school)	4 (1.0)	3 (0.6)	0.461[b]	-0.024
Slogan in post (collection)	1 (0.2)	4 (0.8)	0.290[b]	0.035
Slogan in post (colors)	0 (0.0)	2 (0.4)	0.215[b]	0.041
Slogan in post (other)	1 (0.2)	2 (0.4)	0.725[b]	0.012
Special day mention in post	13 (3.2)	39 (7.5)	0.006	0.091

a. No statistics are computed because concerned subcategories were never coded as “1”.

b. Statistically not significant since asymptotic significance (2-sided) value is larger than 0.05.

7.2 Interpretation of the Findings

Content analysis shows that both LC Waikiki' and Koton's primary marketing strategy on their standard Instagram posts is sharing product imageries without any brand elements. While following marketing strategy for both brands is celebrity and influencer endorsement, and third marketing strategy both brands apply is sharing brand elements. Since there is a transition from unregistered and unbranded apparel and footwear to branded apparel and footwear, applying brand elements marketing strategy on Instagram is not surprising. On the other hand LC Waikiki differentiates by applying product placement in TV series, competition, and children-related content marketing strategies on Instagram, while Koton differentiates by applying price promotions marketing strategy. As a challenger brand, it can be said that Koton is trying to steal market share from market leader LC Waikiki by communicating price competition on Instagram as well.

Both brands' standard Instagram posts mostly contain female, male, and children images respectively. On the other hand while Koton focuses on females more than LC Waikiki, LC Waikiki focuses on children more than Koton. Since children are likely to become aware of fashion trends at a younger age, LC Waikiki might benefit by focusing on children. On the other hand Koton might benefit from focusing on females, since it is predicted that consumers' awareness of the latest fashion trends will support the performance of women's clothing.

Mostly shared product types on Instagram are respectively tops, bottoms, footwear, and outerwear for LC Waikiki; Koton mostly shares bottoms, tops, outerwear, and footwear respectively. On the other hand, Koton differs from LC Waikiki by sharing posts exhibiting underwear and swimwear.

When slogans shared in posts are examined, it can be said that LC Waikiki communicates fashion in their slogans, while Koton communicates style. Koton also differentiate by sharing special days related posts. By this means, Koton might benefit from gaining of occasional marketing activities.

According to results of analysis, it can be said there is seasonality in terms of marketing strategies performed by both brands on Instagram. LC Waikiki performs children-related content marketing strategy only in autumn. Since schools reopen at the beginning of autumn, it can be said that LC Waikiki considers seasonality while

performing marketing strategies on Instagram. On the other hand, Koton performs celebrity or influencer endorsement marketing strategy on Instagram mostly in autumn.

Product types shared on Instagram also differs by seasons for both brands. Both brands shares images of dresses mostly in summer. While LC Waikiki shares images of footwear and accessories mostly in winter, Koton shares images of outerwear mostly in winter. Sharing images of dresses mostly in summer, and sharing images of outerwear mostly in winter are not surprising but mostly related to own dynamics of apparel consumption rather than approaches of brands while sharing Instagram posts.

7.3 Limitations of the Research and Future Suggestions

In this paper content analysis of standard posts on Instagram is conducted. Standard posts are the posts which are still mostly shared post types by Instagram users. However, Instagram is being updated day by day and, users meet new features such as carousel posts, and stories. In order to better understand how brands perform their Instagram marketing strategies, content analysis of moving images, reposts, and carousel posts might also be conducted.

Besides, content analysis is conducted for posts with the period from March 1, 2018, to March 1, 2019. The analysis might be further improved by analyzing posts with the period more than one year.

One another limitation to this research is that it was not analyzed that how consumers react to Instagram activities of brands. It might be investigated that for instance which posts have the most like and how the count of likes are related to marketing strategies performed by the brands.

8. CONCLUSION

The competitive environment in the apparel industry is increasing. In the digitalized world, the media is shifting to digital channels. For this reason, digital marketing activities started to be important for brands. It is important for brands to reach the target audience by differentiating in the content produced on their social media platforms. In Turkey, Instagram is the second most active social media platform following YouTube. In addition, Turkey is the global leader in terms of Instagram's addressable advertising audience by January 2019.

In the light of all these developments, this study represented the content analysis of standard posts on Instagram by Turkey apparel industry market leader LC Waikiki and its challenger Koton.

Results indicated that both brands are performing several marketing strategies on their Instagram posts. Koton as a challenger brand don't differ from LC Waikiki, market leader, in terms of first three marketing strategies (product imagery without brand elements, celebrity or influencer endorsement, brand elements) performed on Instagram posts of both brands. On the other hand, there are some strategies two brands differ from each other. For instance while LC Waikiki performs children-related content marketing strategy by considering appropriate season, no such strategy was encountered on standard Instagram posts of Koton. Likewise, Koton performs price promotions marketing strategy that LC Waikiki does not. It can be said that Koton differentiate by communicating price competition in order to expand its target audience, and gain market share, while LC Waikiki differentiates by communicating children-related content in order to obtain potential new buyers from a specific group such as parents, and preserve its market share.

Another important implication from the analysis is that there is seasonality in terms of marketing strategies performed by both brands on Instagram. The best practice of seasonality in this analysis is that LC Waikiki performs children-related content marketing strategy in autumn when schools reopen.

In a period when the content produced on social media is so much and the consumption of social media is so intense, brands should analyze the changing consumer trends and the approaches of competition, and produce content accordingly.

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