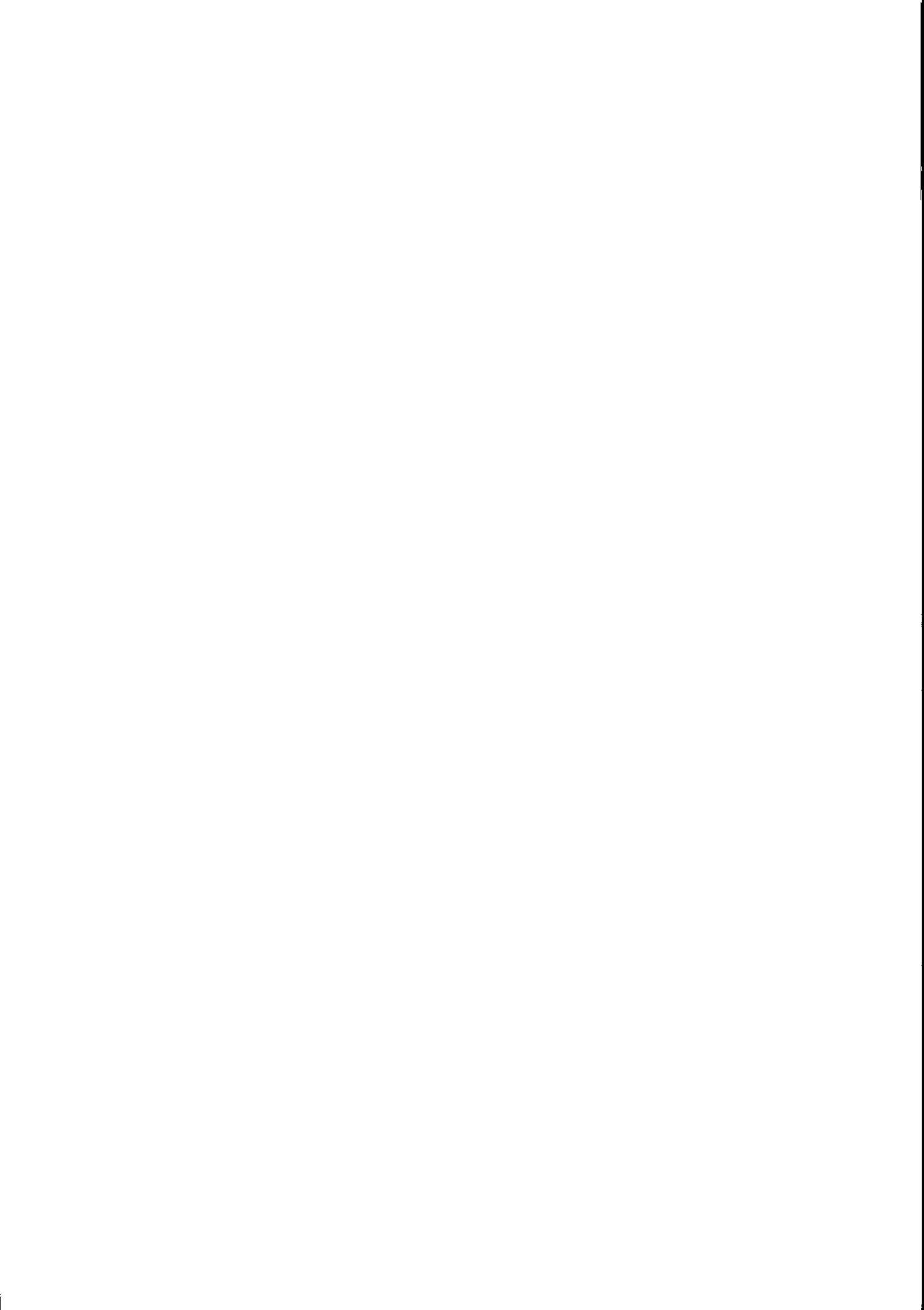


**Ph. D. in Business Administration & Management  
XVI Cycle  
Bocconi University**

**OPINION MAKERS: CREDIBLE INFORMATION SOURCES  
AND TARGETS OF MARKETER INFLUENCE**

Doctoral Dissertation by  
Diego Rinallo



*To my family*





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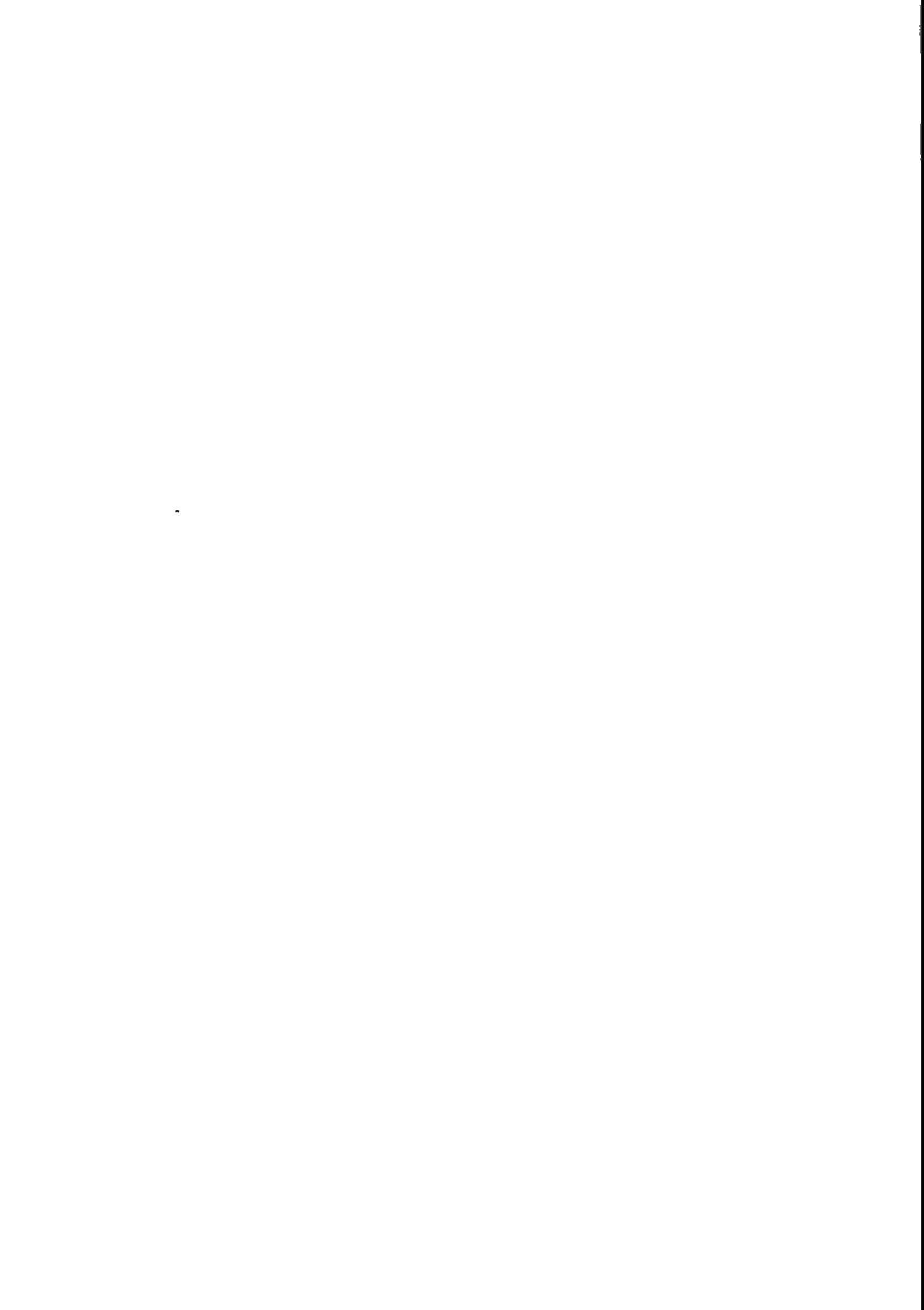
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## Introduction

Modern societies are characterized by an increasing specialization of knowledge and division of intellectual labour. Experts that by virtue of a formal training have developed the expertise and knowledge necessary to solve specific problems are valued and relied upon by many institutions in several areas of social life. The presence of these experts in the mass and specialized media is pervasive: they are interviewed and asked informed opinions about issues in the news agenda and in some cases cooperate on a stable basis with media organizations, as in the cases of movie and theatre critics and specialized journalists. In this work, these expert sources of information will be called opinion makers as a tribute to their persuasive capability. Because of their perceived neutrality and competence, expert advice is seriously taken into consideration by many buyers and, consequently, business organizations try to influence experts in order to be covered and favourably evaluated. Not surprisingly, marketing scholars have investigated these information intermediaries and have provided some unique contributions in explaining the conditions under which a demand for expert opinion emerges in the context of purchase processes and the position of opinion makers in the hierarchy of information sources employed by consumers.

Yet, marketing literature is at the same time limited, particularly when compared with the huge body of scholarship developed on the topic in the context of other disciplines. With respect to *typologies of opinion makers* investigated, marketing research has almost exclusively focused on critics, whereas other opinion makers (*ad hoc* experts relied upon by the media to shed light over issues of the day or specialized journalists), that have instead been thoroughly investigated by other disciplines, have received a very limited attention. With respect to *research approaches* employed, marketing scholars have mostly employed a “demand-side” perspective, since they have tried to investigate the degree of influence opinion makers have over their audience. On the other hand, marketing scholars (unlike their colleagues in other disciplines) have only marginally adopted a research perspective that could be termed as “supply-side”, aimed to investigate the processes through which expert opinion is reached and the patterns of influence over it. Finally, as far as *attention to business influence over*

*opinion makers* is concerned, marketing scholars have so far seldom referred to it. Most prominent is the lack of knowledge on manners to influence opinion makers.

With these limitations in mind, the purpose of the present dissertation was to extend marketing knowledge by employing a “supply-side”, rather than “demand-side”, perspective, with the intention to document both the working routines of opinion makers and companies’ attempts to influence them. The empirical setting I chose to explore is the fashion industry, where opinion making phenomena are conspicuous, but have not been explored yet by marketing scholars. More specifically, my research question was the following: “*Which are the determinants of fashion journalists’ attention to specific fashion companies’ products?*” To provide some answers, I employed a three-step research approach. I initially conducted a preliminary study, in order to better frame my hypotheses and to inform data collection for my quantitative analyses. In my quantitative study, I tried to measure the relative impact of different factors (e.g., advertising budget, product newsworthiness) on product coverage in consumer magazines. With the last, follow-up study, I tried to highlight effective ways to obtain media visibility. By balancing qualitative and quantitative methods, I both obtained thick descriptions of the fashion industry and its opinion makers, and identified some best practices leading to both greater coverage, and coverage of good quality.

The structure of the dissertation here presented is as follows. The first part of the work is dedicated to an extensive literature review. I initially examined the theoretical foundations of opinion maker phenomena, that may be traced in many disciplines across psychology and sociology, and especially in media studies, in order to provide a literature-based definition of opinion makers. I subsequently examined the specialized bodies of knowledge that have investigated specific typologies of opinion makers, because of theoretical significance and/or practical implications, with the purpose of highlighting common research trajectories and findings. Finally, I concentrated on the marketing literature and, while appreciating its unique contributions, I also highlighted the limits previously noted, that constituted the foundation of my empirical study. The second part of the work reports such a study.

*Part 1*

*Theoretical Overview and Literature Review*



## 1. Defining opinion makers: Theoretical foundations

Modern societies are characterized by an increasing specialization of knowledge and consequent division of intellectual labor. Experts that by virtue of a formal training and other credentials are credited with the expertise and knowledge necessary to solve specific problems are valued and relied upon by many subjects in different areas of social life, and very often the media ask them to shed light over issues that regard their area of expertise, both on *ad hoc* and stable bases. Because of the pervasiveness of their presence in society, experts have been investigated by social scientists belonging to several disciplines. The purpose of the present chapter is to review the most significant contributions that may help explain the role played in society by these experts, that will be referred to as *opinion makers* (OM) as a tribute to their persuasive capability. The discussion that follows is mono-disciplinary, i.e., it focuses on specific disciplines and bodies of knowledge (as schematized in Table 1.1), with the aim to highlight their contributions to a theoretically grounded definition of opinion makers that is broad enough to be applied to all kinds of experts. The chapter that follows, on the other hand, analyzes opinion makers that influence markets (e.g., critics, security analysts, etc.), and adopts a multidisciplinary approach when required.

Table 1.1 – Theoretical foundations of opinion making phenomena

Discipline	Issues of interest investigated
Cognitive Psychology	What is expertise and what is necessary to make an expert
Social Psychology	Why experts are credible sources of information
Sociology of Professions	Emergence of hierarchies of expertise based on reputation How expert theorization may influence organizations
Media Studies	Experts as media sources and specialized journalists as experts To what extent and how experts influence society External constraints to media content

An obvious starting point for such a review consists in the discipline of *cognitive psychology* that has produced a significant body of knowledge on how individuals, over time, become experts, very often with educational implications in mind. Although this literature is very seldom referred to by the scholars that have analyzed specific typologies of opinion makers, it constitutes nevertheless a fundamental basis for the purposes of the present work. A second step consists in the explanation of why, to the extent that it is perceived, expertise leads to social influence: here, reference is to the discipline of *social psychology*, that most directly studies how individual and group behaviors and mental states and processes are developed as a consequence of the presence of other people. Expertise alone is not enough to generate persuasive messages: trustworthiness is also needed, otherwise messages will be “discounted” by audience and will not produce changes in opinions, attitudes, and behaviors. Further, expertise, as a determinant of credibility, is just one of the possible mechanisms leading to social influence: contrasting the differences between such mechanisms will subsequently permit to distinguish opinion makers from other typologies of influencers. Social psychology has been an influential perspective in consumer behavior, and has mainly been adopted in the study of advertising, as it will be discussed in chapter 3.

As a further step, I will focus on the *sociology of professions*, which sheds light on some issues that are of significant interest for the purpose of the present work. Sociologists of professions have highlighted the fact that experts belong to occupational communities where a reputation for expertise plays an important role, relevant both for status within the community and for the interaction with other social actors (customers, public bodies, etc.). This work has influenced institutional sociologists, who assign professional experts the ability to subtly influence organizations (both for profit and not for profit) to behave in ways that conform to dominant cognitive models and advance their professions’ agenda. Institutional sociology is an influential perspective that has been employed to discuss both the ways through which opinion makers reach consensus and the manners through which they may constrain organizations (e.g., in the cases of literary critics and security analysts), as it will be shown in chapter 2.

Finally, I will consider the broad field of knowledge that evolved from the sociology of mass communication and is now referred to as *media studies*. The media, occupy an important role in modern societies. Much like the three traditional powers of the State discussed centuries ago by Montesquieu, the fourth power relies on experts that are employed as media sources. Further, most specialized journalists can be themselves considered experts. Thanks to the resonance the media provide to their opinions, these experts' influence extends far beyond their immediate social networks. Given that opinion makers' influence capability is a direct consequence of the visibility that their ideas and messages are provided by the media, research on media effects on audience is instrumental in understanding their role in modern mass society. Further, the various streams of research that have investigated external influences over media content are instrumental in understanding the conflict of interests that have been investigated in the context of some typologies of opinion makers (e.g., medical experts, security analysts).

The arrival point of this review is the proposition of a formal definition of opinion maker, which sums up the different strands of literature here discussed. As a final note, it must be added that in modern societies, expertise plays an important role also in policy making and legal systems. Although the literature that has investigated these issues is not central to the goals of the present work, the main perspectives and empirical findings are briefly discussed in Appendices 1.1 and 1.2.

### *1.1 – What is expertise? Cognitive psychological perspectives*

Opinion makers are first and foremost expert over a particular domain of knowledge: their ability to influence others' opinion is a direct consequence of their expertise. A review of the literature regarding expertise, then, is a necessary starting point for the purposes of the present work. Since De Groot's (1965) seminal work on chess masters, social and behavioral scientists have been investigating characteristics of experts, and several theories exist about the acquisition of expertise, which is typically defined in terms of performance achievements. According to Gruber (2001), for example, expertise "denotes the outstanding performance of an individual in a particular

domain (e.g., medicine, physics, chess, music). 'Experts' thus are persons who, by objective standards and over time, consistently show superior performance in typical activities of a domain".

A second important characterization of expertise is that people (unlike talented or gifted individuals) *become* experts: in other words, expertise is *acquired* through training and practical experience. Thus, it takes time to become an expert: as a rule of thumb, in virtually any complex domain, the development of expertise is a function of extensive domain-related practice and training, typically exceeding ten years; moreover, this appears to be a necessary but not sufficient condition, since this long term practice must be thoughtful, reflective, and self-critical in order to lead to expertise (Ericsson & Smith, 1991). Without a long period of practice, even the most talented individuals cannot achieve outstanding levels of performance. Because of this requirement, expertise is domain-specific, and being an expert in a given area (e.g. chess playing) does not lead to superior performance in other fields (e.g. playing tennis).

From a methodological point of view, two research methods have been mostly employed (sometimes jointly) in the study of expertise (Gruber, 2001).

- *Quasi-experimental contrastive approach* (Voss *et al.*, 1986) – The approach consists in the comparison of experts with novices and, sometimes, with subjects with intermediate levels of expertise (semi-experts). Maximization of the difference in expertise is useful in highlighting the contrasting characteristics of the groups investigated, in establishing theories of expertise and in drawing educational implications for its acquisition. These cross-sectional comparisons may also be interpreted as developmental models (i.e., from novice to expert).
- *Retrospective analyses* – There are two variants in this method: both share the idea that experts themselves are the most valid and authentic data source about expertise. A classical approach is the biographical analysis of famous experts, in order to enlighten how outstanding success in a given field was obtained. A



second variant consists in the retrospective reporting by contrastive groups about their expertise career.

Results of research in expertise suggest that the determinants of high performance are a large and organized knowledge base, refined technical skills, and perceptual capabilities that allow experts to see the world in distinctly different ways from non experts (Ericsson & Smith, 1991). A consistent finding of related research is that experts (compared to novices or non experts) have excellent memory for domain-specific information and become able over time to perform some tasks in a highly automatic fashion. As far as *memory* is concerned, it is important to note that differences respect to novices cannot be explained by general memory factors (Gruber, 2001): in contrastive experiments, no statistically different differences occur between experts and novices as far as control tasks involving memory are concerned. According to studies regarding different domains of expertise, both novices and experts are subject to the same limitations in short-term memory (i.e.,  $7 \pm 2$  units, Miller, 1956): what differentiates experts from novices is the fact that the former integrate small knowledge units into larger units, defined as 'chunks', which are labeled with indices that are subsequently used during recall instead of the individual, small knowledge units. As a consequence, "whereas a chess novice sees a number of isolated chess pieces, the expert recognizes about the *same* number of *larger* units – for example, one might be a 'king defense configuration' – each composed of a number of chess pieces" (Feltovich, 2001). Findings regarding chess players have been replicated in numerous other fields (e.g., the game of bridge, Engle & Bukstel, 1978; GO, Reitman, 1976; and electronics, Egan & Schwartz, 1979): a common finding in such studies is that chunk *size* has been shown to be larger for experts (Feltovich, 2001).

As far as *automaticity* is concerned, research shows that domain-specific operations that are initially slow, serial, and demand conscious attention become, with the acquisition of expertise, fast, less deliberate, and can run in parallel with other processes (Feltovich, 2001; Schneider & Shiffrin, 1977). For example, expert typists can contemporarily type and recite nursery rhymes (Shaffer, 1975). Similarly, skilled

abacus operators can answer routine questions without loss of accuracy or speed in working with the abacus (Hatano *et al.*, 1977). Expertise requires then a certain degree of automacity. "In complex skills with many different cognitive components, some of the more basic ones (e.g., fundamental decoding/encoding of inputs) must be automated if higher levels skills such as reasoning, inference, and integration are ever to be proficient" (Feltovich, 2001). This means that a major limitation of novices is their inability to utilize all of their knowledge, because of overload or inefficiency in using short-term memory (Feltovich *et al.*, 1984; Jeffries *et al.*, 1981).

Besides these basic findings over the nature of expertise, research has also tried to investigate the process of acquisition of expertise, also with the aim of providing guidance over educational matters. Some efforts in this direction have produced stage models: an early one is Cleveland's (1907) five-stage model of chess playing. Although they provide hints about typical developments, such models do not lend themselves to instructional implications. For this purpose, theories of learning processes are more useful because, as previously suggested, years of experience are a necessary but not sufficient condition for expertise acquisition. Two important perspectives have emerged in this context: the 'deliberate practice' approach and the dynamic memory model.

A first model of acquisition of expertise was proposed by Erickson *et al.* (1993), who found with retrospective methods that experts started differing from their less-expert counterparts earlier in their careers. Main differences were that they practiced more efficiently; had more committed teachers; and showed higher achievement demands. As a consequence, future experts were soon involved in "deliberate practice" (Erickson *et al.*, 1993), i.e. effortful training over long periods of time that had the sole purpose of improving performance. Erickson *et al.* (1993) also discovered that individuals only rarely engage in deliberate practice in a spontaneous way: although knowing that doing so would increase their personal performance level, most people prefer to invest their time in activities motivated by external rewards or inherent enjoyment. The instructional implication of the model, then, is that teachers should foster the motivation for deliberate practice, "by offering explicit teaching goals,

feedback, and opportunities for gradual improvement through repetition and correction of errors” (Gruber, 2001).

The model of *dynamic memory* (Kolodner, 1983) suggests that experiencing and reflecting upon relevant episodes is important for the acquisition of expertise; the model explains how episodes are represented in memory, and how episodic experiential knowledge can be applied. More in detail, in this context, knowledge is composed of “episodic definitions”, which include the subjective relevance and perception of episodes, and knowledge about applicability and application errors. In a nutshell, two classes of events lead to learning from experience: analysis of errors and generalization across episodes. After an error occurs in a specific episode, experts tend (more than novices) to interrogate themselves about what went wrong. In other words, the deviation of the episode from the norm is explicitly considered and stored in memory; such knowledge about errors can be employed in later moments in order to avoid making further mistakes. The essence of this theory is rather intuitive; it is however supported by the fact that episodic definitions of experts are superior to those of novices.

Although the gaining of expertise is usually characterized cognitively, as an individual achievement, and studied accordingly, socio-cultural factors are also important determinants. In their review, Hatano & Oura (2001) argue that expertise is rooted in culture because: (i) many forms of expertise occur through participation in practice; (ii) some forms of expertise are culturally valued and, thus, practice for them is culturally organized; (iii) consequences of expertise are socio-cultural as well as cognitive, in a process in which beginners, through a “legitimate peripheral learning” become through social processes fully qualified members of their community-of-practice (Lave & Wenger, 1991). The educational implication of this is that the involvement of “real” practitioners in learning situation may have a deep impact on the eventual acquisition of expertise.

In sum, the previous review of literature permits to propose an initial *sine qua non* characterization of opinion makers: they are experts, who have domain-specific,

high and stable levels of performance, at least partially determined by a more efficient use of memory and more automatic task realization. The acquisition of expertise requires a long period of time of formal training and experience as a necessary condition; further, to become experts individuals have to engage both in deliberate practice to improve performance *and* in involvement in their occupational community. As suggested by stage-models, expertise is a continuous, rather than dummy, variable; for those without relevant domain-specific knowledge, however, it could be difficult to differentiate among experts: external sanctions of expertise (such as those bestowed by the State or the professions) will usually be employed in order to infer the level of expertise (see par. 1.3). Having characterized experts, we can now try to understand under which conditions they may be considered opinion makers: to answer this question, we have now to look at the social psychology of opinion change.

### *1.2 - The contribution of social psychology: Source credibility as a function of expertise and trustworthiness*

Social psychology studies how individual people's thoughts, feelings, and behaviors are influenced by other people (Allport, 1954). Not surprisingly, it has roots deeply grounded in both psychology and sociology, to the extent that according to some commentators, "[i]n practice, there are two social psychologies. Psychological social psychology assumes that 'in the beginning there is the individual' and focuses on individual's social cognitions. Sociological social psychology assumes that 'in the beginning there is society'; its distinguishing charge is to locate interactional processes in their social structural context" (Stryker, 2001). The study of social influence mechanisms occupies an important part of most social psychology textbooks, since much of the discipline's early work was concerned with the processes by which the real or imagined presence of others affects beliefs and behaviors. Within social influence research, two important areas of inquiry are the study of social influences arising from small-group interaction and that arising from persuasive communication (Kelman, 1961).

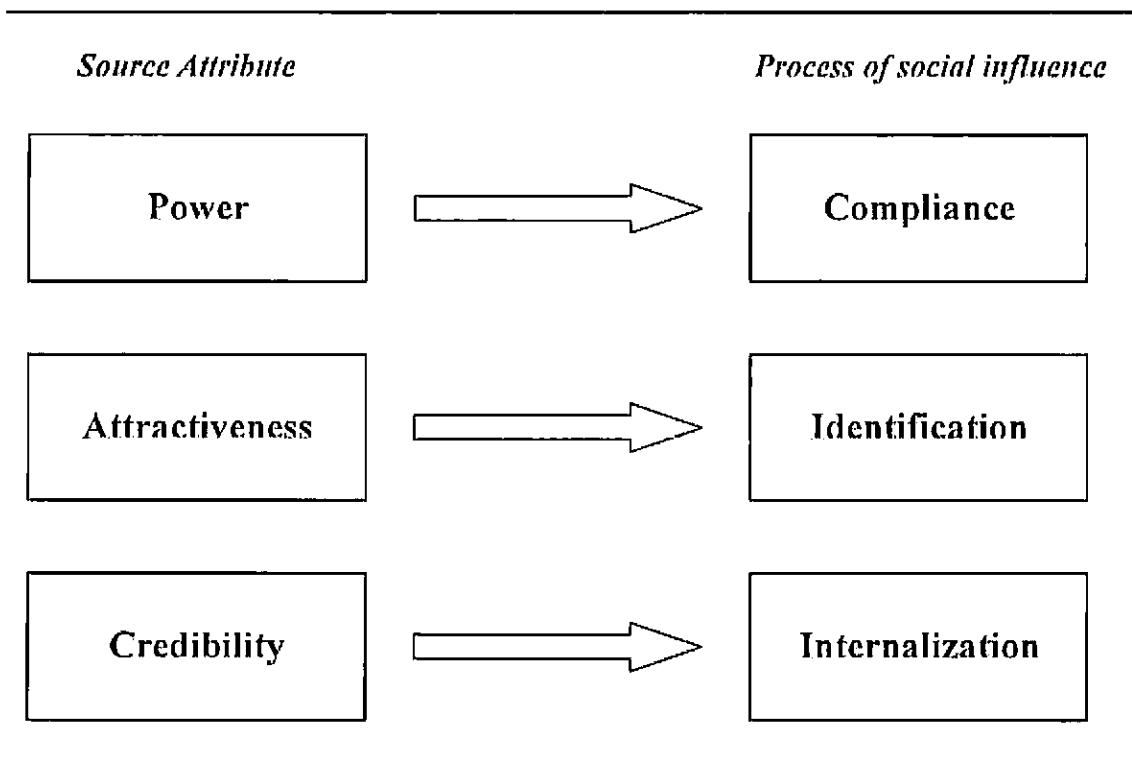
As far as the former is concerned, social influence scholars distinguish group majority from minority influence. As far as majority influence is concerned, a basic finding of related research is that people exhibit *conformity* when they change their attitudes or behaviors in order to resemble what they believe most people like them would think or do (Burger, 2001). According to psychologists, conformity may be explained by either informational or normative influence (Deutsch & Gerard, 1955). In the first case, people agree with the perceived norm because they lack confidence in their own judgment and assume that the typical judgment is correct. When instead conformity reflects normative influence, the individual's primary concern is to gain social approval and to avoid the consequences of appearing deviant<sup>1</sup>. Minority influence may also occur. The influence of small subgroups produces its effects as a consequence of strong determination and internal cohesion (Moscovici, 1976; Mucchi Faina, 1996).

Of greater interest for the purpose of this review is the influence arising from a persuasive source of communication. Here it is worth to note that while persuasion implies social influence, the contrary is not necessarily true: for example, in the case of obedience to a command from an authority figure, influence occurs but persuasion does not. Kelman (1961) distinguished among three different processes of social influence, each characterized by distinct source characteristics and different degrees of persuasion: compliance, identification, and internalization (see Picture 1.1). Such categorization deeply influenced the following debate, and is described in detail below.

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<sup>1</sup> A fairly known demonstration of normative conformity is Asch's (1951) famous experiment, which required participants to engage in a simple line judgment task. Only one of the individuals in the study was however a real participant, while the others were confederates who provided wrong answers. Asch's (1951) found that in a significant number of trials, the participants did not provide what they knew to be the correct answer, but conformed instead to the 'wrong' norm and gave the same response as the rest of the group.

Picture 1.1 – Processes of social influence and corresponding source attributes



Source: Adapted from Vannoni (2001).

*Compliance* occurs when “an individual accepts influence from another person or from a group because he hopes to achieve a favorable reaction from the other” (Kelman, 1961). A favorable reaction, in this context, means the attaining of a specific reward or the avoiding of a specific punishment that the influencing agent controls. The influenced individual complies in order to achieve a desired response. Here persuasion does not occur at all: as Kelman himself notes, the influenced individual “does not adopt the induced behavior – for example, a particular opinion response – because he believes in its content, but because it is instrumental in the production of a satisfying societal effect”. Compliance as a process of social influence may be adopted by source characterized by *power* toward the influenced individual, or more precisely by “means control”, i.e. by the fact that the source is in a position to supply or withhold means needed by the individual for the achievements of his/her goals. Kelman (1961) specifies that “[t]he perception of means control depend on an agent’s *actual* control over specific rewards and punishments, or on his *potential* control, which would be related to

his position in the social structure (his status, authority, or general prestige)". This is the most superficial of the three processes of social influence, since the induced response relies upon surveillance by the influencing agent.

*Identification* occurs when "an individual adopts behavior derived from another person or group because this behavior is associated with a satisfying self-defining relationship to this person or group" (Kelman, 1961). In this context, a self-defining relationship is a role relationship that forms a part of the person's self-image. Accepting influence is then a way of establishing or maintaining the desired relationship to the other, and the self-definition that is anchored to this relationship. In this case, the individual actually believes in the opinions and the actions adopted: they are adopted both publicly and privately, and their manifestation does not depend on observability by the influencing agent. It rather depends on the role that the individual takes at any given moment in time: "only when the appropriate role is activated – only when the individual is acting within the relationship upon which the identification is based – will the induced opinions be expressed" (Kelman, 1961). Identification occurs when the source influence capability is based upon *attractiveness*. A source is attractive if he/she occupies a role which the individual desires: in this conceptualization of the construct, attractiveness does not refer to the possession of qualities that make a person likable, but rather to qualities that make a continued relationship to the source particularly desirable. What matters in order to this mechanism work effectively is the salience of the relationship to the source for the individual. Identification may be considered as an influence mechanism of intermediate intensity.

Unlike credibility (see below), Kelman's definition of attractiveness has not been influential in consumer and advertising research (see chapter 3); the conceptualization proposed by another social psychologist has been much more often referred to in such disciplines. According to McGuire (1985), attraction is a function of familiarity, likeability, and/or similarity of the source with the audience. *Familiarity* is defined as knowledge of the source through exposure. *Likeability* is affection for the source as a result of the source's physical appearance and behavior. *Similarity* is

resemblance between the source and receiver of the message. The model proposes that sources who are known to, liked by, and/or similar to a consumer are attractive and, because of this, persuasive.

*Internalization* occurs when “an individual accepts influence because the induced behavior is congruent with his value system” (Kelman, 1961). The most obvious examples of internalization are those that involve the evaluation and acceptance of the induced behavior on rational grounds, as when a person accepts the recommendations of an expert. Hence, through internalization the induced behavior becomes part of a personal system, and independent of the external source: “its manifestation depends neither on observability by the influencing agent nor on the activation of the relevant role” (Kelman, 1961). The crucial dimension, for internalization to occur, is the credibility of the influencing agent. An agent is credible to the extent that his/her statements are considered truthful and valid, and hence worthy of serious consideration. Thus, of the three influence mechanisms, internalization is the deeper.

Since credibility is a main distinguishing feature of opinion makers, for the purpose of this review it is worth considering in more detail how social psychology define the constructs and identify its principal antecedents. Hovland, Janis & Kelley (1953) distinguished two orthogonal dimensions in credibility: *expertness* (redefined as expertise by later contributions) and *trustworthiness*. This means that an individual may be perceived as credible to the extent that he/she is considered likely to know the truth *and* to tell the truth. More details follow.

- Trustworthiness refers to the degree to which an audience perceives the assertions made by a communicator to be ones that the speaker considers valid (Hovland, Janis & Kelley, 1953: 22). Trustworthiness refers to the honesty and believability of the source (McGinnies & Ward, 1980): obviously enough, this dimension of credibility is strictly related to source neutrality, i.e. to the fact that the source is not self-interested.



- Expertise/expertness refers to the extent to which a speaker is perceived to be capable of making correct assertions (Hovland, Janis & Kelley, 1953: 22). Other definitions of expertise have however been proposed: McGuire (1969: 182) defines it as an individual's "perceived ability to know the correct stand on the issue". Some scholars have argued that, as far as operationalization of the construct is concerned, most empirical contributions show a certain degree of confusion between expertise and experience<sup>2</sup>: while both imply the acquiring of skills and/or knowledge over an issue, expertise may be obtained only through some type of formal training (Jacoby et al., 1989; Braunsberger & Munch, 1998). This distinction appears coherent with the way cognitive psychologists define the construct.

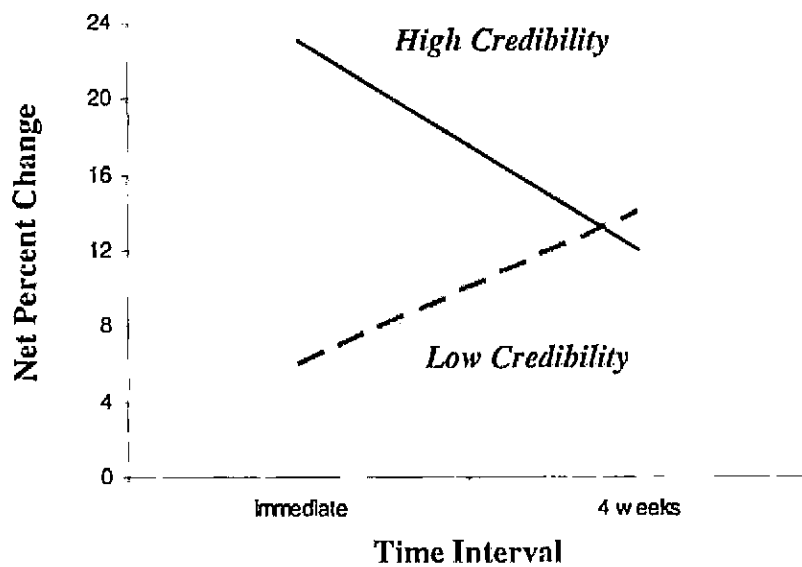
Social psychological research has consistently shown the existence of a positive relationship between source credibility and persuasion (Hass, 1981; McGuire, 1969). Sternthal, Philips & Dholakia (1978), in their review of experimental research on the issue, argue that experimental research shows that, at least to the extent that only main effects are considered: (i) highly trustworthy and/or expert sources produce a more positive attitude toward the position advocated than sources who are less trustworthy and/or expert; (ii) highly credible sources often induce more behavioral compliance than sources having less credibility. Such findings are convincing enough that most research on source credibility focuses on determining the limit of the phenomenon and identifying factors that interact with it. For example, less credible (Brock & Saine, 1975) and moderately credible (Bochner & Insko, 1966) sources are more persuasive than highly credible sources in the case of subjects who favour the advocated position. Even though communications from credible sources may be more persuasive than those of less credible sources *in the short term*, the effect of time may lessen the observed differences in persuasion. Hovland & Weiss (1951), in their test of the process of forgetting, found that the investigated subjects, at the time of exposure, actually discounted messages coming from less credible sources; "[w]ith the passage of time,

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<sup>2</sup> For example, in Brock's (1965) experimental study, the manipulation of expertise occurred in this way: the *experienced* salesperson reported he had used 20 times as much paint as the subject's prospective purchase of paint, whereas the *inexperienced* salesperson reported paint consumption equal to the subject's.

however, [individuals] may remember and accept *what* was communicated but not remember *who* communicated it". This phenomenon, known in literature as the "sleeper effect", is graphically depicted in Picture 1.2. Many studies have not however been able to show the constant presence of a sleeper effect (see Capon & Hulbert, 1973, for a review).

**Picture 1.2 – The sleeper effect: Changes in extent of agreement with position advocated by "high credibility" and "low credibility" sources**



*Source:* Adapted from Hovland & Weiss (1951).

To conclude, it must be noted that the persuasive effect of source credibility may be accounted for also by cognitive response theory (Greenwald, 1968), and by attribution theory (Kelly, 1967). According to *cognitive response theory*, social influence is determined by the overall favorability of thoughts or object-attribute associations available in memory at the time of judgment. Two typologies of thoughts are considered by the theory: message and own. Message thoughts are stimulated by the information presented in a message: hence, they are likely to support the position advocated by the source. Own thoughts, on the other hand, are object-attribute

associations previously stored in the subject's memory, that are relevant to the position but not directly represented in the appeal. Own thoughts may both support or counter the position taken in the appeal. Accordingly, source credibility is negatively related to own thought activation: consequently, a more credible source will reduce counterargumentation and result in greater persuasion. A less credible source, under the same condition, will facilitate counterargumentation, resulting in decreased message persuasiveness. According to *attribution theory* (Kelley, 1967), individual who are exposed to a message act as naïve scientists, since they try to assess whether the message provides an accurate representation of reality and/or whether the source of the message lacks credibility. When the source has external reasons to account for a given opinion, recipients of the message will consider such opinion as less credible than when such reasons do not exist. This so called "discount principle" suggests that in presence of doubts about the true reasons behind a source's opinion, the opinion will be "discounted" and not believed. Thus, for example, second-hand cars are evaluated less favorably when the expert endorsing them (a mechanic) has incentives for endorsing their purchase compared to when no incentive is present (Wiener & Mowen, 1986).

To recap, the research here reviewed is useful for a discussion of opinion makers because it provides their influence capability with a social psychological foundation. OM are credible sources of information over matters on which they are competent: their credibility is a function of their expertise *and* of their trustworthiness. Such twin determinants of credibility have consequences: because of trustworthiness considerations, the doubt that an OM is not neutral in his/her opinion should in line of principle decrease his/her credibility, because of discounting from audiences.

### *1.3. Experts as an occupational community: Contributions from the sociology of professions and institutional sociology*

A stimulating way to look at experts is by observing that they belong to more or less professionalized occupational communities. The sociology of professions is a branch of the sociology of work concerned with the analysis of expert occupation. Since Herbert Spencer's (1886) work, they have been defined as occupations that perform tasks of great social value, because professionals possess both knowledge and skills that set them somehow apart from other kinds of workers. Professional occupations even contribute to define their members' identities. Van Maanen & Barley (1984) define occupational communities as "bounded work cultures populated by people who share similar identities and values that transcend specific organizational settings". Arts critics, marketing professors, sports journalists, mechanical engineers all have specific work cultures that produce and reproduce themselves through a variety of rituals, accounts, logics, and languages that reinforce the value and distinctiveness of the occupation (Van Maanen & Barley, 1984). A central point of the literature focusing on professionals working in organizations is that they may experience role conflicts, because the required tasks may sometimes conflict with values and behaviors deemed central by the profession (Hinings, 2001). As we will see, this kind of conflicts is empirically researched in the context of the literature addressing specific categories of opinion makers (chapter 2).

The professions also impact the development of expertise that is specific to a certain occupation and, as also highlighted by neo-institutional scholars (Meyer & Rowan, 1977; DiMaggio & Powell, 1983), the theorizations that they collectively develop may significantly influence organizations. The purpose of the present paragraph is not to discuss in its entirety the literature that has analyzed professions *per se* and their role in organizations (for recent reviews, see Hinings, 2001 and Abbott, 2001), but rather to selectively highlight findings that are relevant for subsequent discussion of opinion makers. More specifically, the following sections aim to discuss: (i) basic findings developed by sociologists of professions that help understanding opinion

making phenomena; (ii) the neo-institutionalist view on the normative impacts that professions have over organizations.

### *1.3.1. Opinion makers as professionals: The contribution of the sociology of professions*

Experts, as discussed in par. 1.1, may be “scientifically” identified because of their sustained high level of performance respect to novices. For lay persons, however, monitoring performance is not usually feasible; expertise is usually inferred (rather than assessed) through the expert’s publicly sanctioned credentials. Sociologists have long identified in this public sanctioning one of the defining features of professions (e.g., Carr-Saunders & Wilson, 1933; Wilensky, 1964; Hickson & Thomas, 1969). For example, according to the widely quoted Greenwood (1957), professions have: a basis in systematic theory, prolonged training and certification; recognized authority over a given area of expertise; community sanction and legitimation; professional culture and codes of ethics. Thus, the professions are instrumental in developing the set of credentials thanks to which the expertise of individuals may be established by third-parties. Such credentials may be issued directly (e.g., certificates issued by the professional associations themselves) or indirectly, through third-party, legitimate institutions (e.g., degrees, diplomas, or other certificates by educational organizations; licenses regulated by States). Would-be experts that lack these official credentials will hardly be believed.

It must however be noted that the fact that the State, public bodies, and the public opinion attribute to a given professional community legitimate claims over a certain area of expertise is not to be taken for granted. Professions may be understood as collective projects in which expert groups seek rewards through control of certain markets for services. Put differently, professional communities collectively compete with other social groups for establishing themselves as the legitimate source of expertise over certain areas of social life, also because of the economic benefits that in this way accrue to them, i.e., monopolistic control of certain markets (Larsons, 1977). This occurs, *inter alia*, by creating barriers for the access to the profession in order to limit supply and by preventing those who do not belong to the profession to provide the

services that characterize it. According to this “monopoly school” (Abbott, 1988); the process that leads to the professionalization of an occupational community is attributed to “a desire for dominance and authority” over the conditions of work (the labor process and the labor market), in order to increase and maintain occupational status and power (Johnson, 1972; Larson, 1977; Friedson, 1986). Further, Abbott (1988) introduces elements of dynamism in this process, by observing that interprofessional competition is a fundamental fact of professional life, which is characterized by jurisdictional disputes between occupational groups over claims to particular expertise and knowledge bases. The constant changes in modern work (both within professions and from beyond of them) recast some professions, privilege others, destroy yet others<sup>3</sup>. Many semiprofessions in fact exists that fight for official recognition by the State and public opinion (Johnson, 1972). Fully-fledged professions react to external threats in ways that further their own agenda.

These ideas parallel those expressed in sociological research focusing on the credibility of scientific disciplines, that thoroughly discusses the boundary-defining language and organizational strategies employed by scientists to protect their interests (Jasanoff, 1987; Moore, 1996; Gieryn, 1999). For example, since the beginning of the environmental movement in the early 1960s, US ecologists have struggled to maintain a distinction between their work and the efforts of environmental activists, in order to defend their credibility that was threatened by critical commentators that had labeled ecology the “subversive science” (Sears, 1964; Shepard & McKinley, 1969). Today, ecologists are increasingly involved in policymaking and activism, and the Ecological Society of America (ESA), the primary professional scientific society for ecologists in the US, is trying to protect its associates from the risk that impacted interest groups accuse ecologists of political bias to decrease the credibility of their research findings. The initiatives ESA is employing to maintain credibility is centered on two related messages: the value-freedom and the utility of the scientific knowledge the discipline produces (Kinchy & Kleinman, 2003). Thus, according to both sociologists of science and professions, the specialized knowledge over which individual experts lay claim will depend, at least partially, by the fact that their professional community has established

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<sup>3</sup> According to some scholars, professions as a whole has lost a significant part of the power they enjoyed in the past (Haug, 1973, 1975; Johnson, 1973; Friedson, 1984).

a recognized authority over it. Such authority, however, is not acquired once and forever, but has to be actively protected from the threats coming from other occupational communities and interest groups.

That said, it must be stressed that within a profession, not all experts are equals. If professional power plays may affect the social standing of a given occupational community and the perceived legitimacy of their claims to expertise, significant differences may be found in the reputations for expertise of the individual members. A Nobel Laureate in Medicine, after all, is not the same as a “common” doctor. On this, Lawrence (1998) documented the differences in reputation within the Canadian forensic accountancy occupational community. Reputation, circulating via words-of-mouth communication, permits clients (i.e., lawyers that “buy” their professional services) to differentiate between the qualified and the “outstanding” forensic accountant. For such lawyers, a forensic accountant reputation as an expert is critical in their choices. Lawrence (1998) suggests also that the reputation of “outstanding” members benefits the entire Canadian forensic accountancy occupational community, since the reputation of this semiprofession, which has not yet gained official recognition, is dependent on the reputations of its individual practitioners.

Related research shows that also organizations within a given field are socially stratified in terms of reputational status (e.g., Shrum & Wuthnow, 1988; Washington & Zajac, 2004; Deephouse & Carter, 2004). Since professionals increasingly work within organizations, particularly in the case of knowledge-intensive service organizations (Hinings, 2001), in most cases the reputation of an individual professional, especially during the early stages of his/her career, will depend on the employer’s reputation. As a whole, these findings show that in professional (or semiprofessional) occupational communities, hierarchies of expertise exist, which are based on the reputation of the individual professional and/or his/her employer. Reputation, at the individual level, may be considered a critical resource that benefits the employer, customers, the individual professional, and the occupational community as a whole.

### *1.3.2. Neoinstitutionalist views on the professions*

Neo-institutional theory (Meyer & Rowan, 1977; DiMaggio & Powell, 1983) is an influential perspective within the sociology of organizations and organization studies. It asserts that organizational structures and practices are adopted by organizations because of beliefs, values, and norms that identify legitimate social purposes and specify appropriate means to achieve them. From an institutional perspective, the adoption of institutionalized items is a means through which organizations may acquire legitimacy, i.e. the “generalized perception or assumption that the action of an entity is desirable, proper, or appropriate within some socially constructed system of norms, values, beliefs, and definitions” (Suchman, 1995). Consequently, a practice considered legitimate in an institutional context may be adopted in order to “demonstrate the organization’s worthiness and acceptability” (Oliver, 1991), or to provide “rational accounting after failures occur” (Meyer & Rowan, 1977). When institutionalization processes occur, then, practices may be “infused with value beyond the technical requirements of the task at hand” (Selznick, 1957: 17), and achieve a taken-for-granted status.

The professions play an important role in the institutionalization of organizational practices and structures (Meyer & Rowan, 1977), since they are carriers of institutional isomorphism within organization fields or, put in a simpler way, they are partly responsible for the processes through which organizations come to resemble each other (i.e., by adopting the same organizational forms, practices, etc.). More in detail, according to this perspective, the professions develop the normative elements that support the institutionalized practices and structures, i.e., the values and norms which “define goals and objectives ... but also designate appropriate ways to pursue them” (Scott, 2001)<sup>4</sup>. This occurs through professional theorization (Strang & Meyer, 1992), i.e. the “creation of a generic organization problem ... and justification of a particular

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<sup>4</sup> More in detail, besides professions there are other carriers of institutionalized structures and items that constrain organizational behavior through different mechanisms: the State, that coerce organizations to adopt through regulation, and other organizations in the field, particularly those perceived as highly successful and legitimate, that exert peer-pressure that results in imitation. (Di Maggio & Powell, 1983; Scott, 2001).



formal structural arrangement as a solution to the problem on logical or empirical ground (Tolbert & Zucker, 1996).

Theorization by the professions paves the way to multiple sources of influence over individual organizations. Thus, personnel experts and labor attorneys can overstate legal threats (Edelman, 1992; Sutton & Dobbin, 1996) and encourage organizations to institute defenses such as grievance procedures. Professional associations of human resource managers may raise the awareness about ethical problems, and foster the adoption of ethical codes of conducts (Weaver, Treviño, & Cochran, 1999). Professional sited outside organizations can unobtrusively influence managers' decision making through training (DiMaggio & Powell, 1983) or systematic evaluation (Pfeffer, 1992), and impel organizations to conform to models dominant in the profession. Thus, organizations may subtly induce organizations to design organizational structures and routines that conform to dominant cognitive models and, as suggested by Abbott (1988), advances the profession' agenda. As nicely put by Rao & Sivakumar (1999), professional experts are self-interested theorists.

#### *1.4 – Expertise in media studies*

Experts, by virtue of extended effort, formal training, and deliberate practice, possess expertise over a given matter. Since lay persons cannot directly evaluate expertise, they will infer it through the expert's credentials. To the extent that no doubts exist on his/her trustworthiness, then, the expert will be perceived as a credible source of domain-specific information. A final step in my characterization of opinion makers emerges when considering that experts are often employed by the media, on an *ad hoc* or continuing basis, to shed light over issues related to their area of expertise. Thus, experts in terrorism were relied upon by media in the aftermath of September 11<sup>th</sup> to comment over risks of subsequent attacks. Economists are asked to provide their view on fiscal reforms or on the rise of inflation. Clinical researchers discuss the need for categories at risk of contagion to vaccinate themselves against influenza. Experts that occasionally appear on the media are not the only professionals that diffuse their ideas through the media: critics routinely write their reviews over movies, exhibitions,

restaurants; motor journalists comment on the newest car models; science journalists tell us about new scientific discoveries and the impact they are going to have on our life... The division of expert labor that is a feature of modern society has impacted the media, too.

Only to the extent that their opinion resonates through the mass or specialized media, experts can be considered opinion makers. When explaining opinion maker influence, basic findings in social psychology and sociology remain valid: appropriate credentials, reputation, perceived expertise and trustworthiness will be important antecedents of credibility. It must however be stressed that the fact that expert opinions are *mediated* has important implications: (i) the audiences that will be reached by the expert are much broader, i.e., they will extend much beyond the expert's immediate social network. Thus, private opinion becomes public domain; (ii) the inner workings of media organizations (e.g., preferred formats for information, journalistic standards for assessing newsworthiness of information, external and internal influences that shape content) will have an impact over the content of expert advice and the way it is expressed. Thus, for example, academic experts will find themselves compelled to synthesize their opinions and "translate" them in an accessible language, with the risk of appearing superficial to their peers; (iii) the persuasiveness of the expert's opinions and messages, to some extent, will depend not only on the experts' characteristics as source (e.g., perceived trustworthiness, credentials), as in the normal, face-to-face interactions, but also on media effects. This means that, according to the theoretical perspective that one employ to shed light over the relationships between media and society, these effects may vary from the very limited to the very strong.

Thus, the huge body of knowledge that, evolving from the sociology of mass communication, is now referred to as media studies adds considerably to our understanding of opinion making phenomena. The purpose of the present paragraph is to discuss the role of expertise in the media and the specific ways through which expert opinion both shapes society and is shaped by society. More in detail, the present paragraph is structured around two centers of gravity, the first being the identification of the main ways through which expertise is presented in the media (i.e., experts as media

sources and specialized journalists as experts), and the second regarding matters of influence (i.e., the influence of mediated expertise over society and advertising, public relations and editorial influences over mediated expertise).

#### *1.4.1 – Experts as media sources*

Different theoretical perspectives and research streams in media studies have investigated the media-source relationship and, not surprising, many have found evidence of the fact that the media employ recognized professional experts to access specialized knowledge and shed light over the news of the day. While all typologies of sources may be said to be somehow experts over an issue, significant differences exist among them. In the context of environmental news, possible sources include, among others, public officials, corporate spokespersons, environmental activists, citizen living in polluted areas, and university-based scientists. Whereas all of these individuals may claim access to relevant expertise and be rather persuasive in supporting their own points of view, their expertise is based on rather different premises. One main purpose of the present section is to distinguish the experts that may be considered opinion makers from other typologies of media sources, on the basis of the available media scholarship. Further, the discussion will be completed by focusing on a specific typology of professional experts, scientists and researchers, which have been investigated by sociologists of science. The research findings produced by these scholars adds to our comprehension of the journalist-source relationship, and permit to shed light over different aspect of interest for our discussion, including, *inter alia*, the factors underlying the hierarchies of credibility within an expertise area.

Sociological studies of media sources and news-source interactions encompass a range of influential theoretical approaches (Cottle, 2003), including agenda building theory; symbolic interaction; neo-Marxism; the sociology of news production; and the sociology of news sources. Although significant epistemological and ontological differences exist among these approaches, it can be said that a common point of contact among them is that they suggest that significant patterns of political, social and economic elite access to the media exists.

- The sociological tradition of *symbolic interaction* (Bulmer, 1969, 1971) sought to explore how labels, symbols and meanings inform human interaction and understanding. This early sociological approach explicitly dealt with issues of social power and proposed the notion of a “hierarchy of credibility” to refer to the elite preferential access to media and the consequences in term of the capability of the powerful to define reality (Becker, 1967). To use the scholar’s word, “[i]n any system of ranked groups, participants take it as given that members of the highest group have the right to define the way things really are ... Thus, credibility and the right to be heard are differently distributed through the ranks of the system” (Becker, 1967: 241).
- Media sources were also investigated in the context of the agenda setting theory (see par. 1.4.3). Once established that media content impacts the salience the public attributes to a given issue, scholars started investigating the problem of *agenda building*, an expression that, broadly speaking, refers to the set of influences shaping the media agenda. Such influences include both the external activities of major news source and the internal dynamics of the media system (e.g., McCombs & Bell, 1996; McCombs, 2001). Agenda building studies found that journalists tend to prefer information from “official” sources (i.e., central and local government, government agencies). Thus, most often than not, “[m]edia statements are grounded in objective and authoritative statements from sources accredited by virtue of their institutional power and position” (Timber, 2001).
- The works of the Glasgow University Media Group (GUMG, 1976; 1980) and Hall and colleagues (1975, 1978) both built upon the ideas of symbolic interactions and were informed by a *neo-Marxist* view of society as influenced by a dominant culture. Journalists are immersed into this culture, and this accounts for the observed preferential patterns of news access. “Access is structured and hierarchical to the extent that powerful groups and individuals have privileged and routine entry into the news itself and to the manner and means of its production” (GUMG, 1980: 114). In a less deterministic way, Hall *et al.* (1978) proposed that “[t]hese two aspect of news production – the practical pressures of constantly working against the clock and the professional demands

of impartiality and objectivity – combine to produce a systematically structured over-accessing to the media of those in powerful and privileged institutional positions” (Hall *et al.*, 1978: 58). As a whole, the powerful are prime definers of events, and their culturally dominant views are continually reproduced in society, also through the media.

- Studies in the *sociology of news production* (Epstein, 1973; Altheide, 1976; Tuchman, 1978; Schlesinger, 1978; Golding & Elliot, 1979; Gans, 1979; Fishman, 1980; Ericson, Baranek & Chan., 1987; Cottle, 1993), mostly based on considerable time in the field, have contributed to reveal the internal workings of news organizations and the routine professional practices that inform their operations. According to Tuchman (1973; 1978), news organizations are bureaucracies that try to “routinize the unexpected” and “tame the news environment”. Of course, journalists typically provide visibility to more of just one source, because of the norm of objectivity that prescribes the *presentation of conflicting possibilities* (Tuchman, 1972): by presenting both sides of the story without favoring either, objectivity may be ritually claimed<sup>5</sup>. News production requires however a stable flow of information. Journalists typically have limited amount of time to familiarize themselves with a story’s background, to gather relevant information, and to write articles. Practical needs their lead to systematic access to media by the more powerful, resource-rich institutions. (e.g., government, the police, big corporations) that have the organizational capacity to manage professionally the flow of news material, by providing information subsidies (e.g., data, pictures, videos, press release) that save journalist time (Gandy, 1982), or even by producing their own “pseudo-events” (Boorstein, 1964; Sigal, 1973). Further, reporters routinely enter the professional worlds of key sources, and negotiate a long-term exchange relationship with them, based upon trust and mutual benefit (Tunstall, 1971), which sometimes results in media dependency (Chibnall, 1977) and the risk that the journalist is captured by his/her principal source’s world-view. Thus, as a whole, the organization of news does not facilitate media access to powerless groups.

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<sup>5</sup> The rule emerged in journalism at beginning of the twentieth century (Høyer, 2001) and is now a professional standard in many countries.

- Other scholars have investigated the media-source relationship from the point of view of the latter. A prominent view is that proposed by Schlesinger (1990: 77), according to whom “it is necessary that sources be conceived as occupying fields in which competition for access to the media takes place, but in which material and symbolic advantages are unequally distributed”. Those who contest official views may be relatively successful in their endeavours. Thus, the *sociology of news sources*, while not denying the assumption of preferential elite access to media, relaxed it and paved the way for studies of how social groups traditionally considered less powerful are able to access the media in spite of their difficulties. Gans (1979), for example, concludes that the success of sources in gaining media attention will depend on different factors: their incentives; power; ability to supply suitable information; geographic and social proximity to journalists. Subsequent studies have empirically documented “competitive fields” where “unofficial” sources co-exist and, in some cases, are even more influential than the official ones in influencing the media agenda, e.g., environmental pressure groups (Anderson, 1993; Hansen 1993), health professionals working in the field of HIV / AIDS (Miller & Williams, 1993), non-official sources working in the voluntary sector (Deacon, 1996).

To recap, for every given story, event, issue, typically many sources competing for media access will co-exist, and all of whom, at a certain level, will claim to possess expertise over it. Professional experts, particularly when based in important institutions (e.g., universities, research centres), may be considered elite sources. It is however important to stress the fact that the foundation upon which their expertise is based is different from that of other sources. Deacon & Golding (1994) suggest that within elite sources, a distinction may be made between professional experts (or “arbiters”) and “advocates”. The former are accessed by the news media to help “legislate”, i.e. to make informed evaluations of statements and opinions advanced by the latter on particular debates or issues, and may prove extremely influential. Professional experts are often believed to present “cold, hard facts” and enjoy an image of technical expertise (Hilgartner & Bosk, 1988). “Advocates”, on the other hand, are persuasive because of mechanisms of group similarity and solidarity (Mayew, 1990): such individuals (e.g.,

leaders of social movements, spokespersons of non profit organizations) are also referred to as prolocutors, in the sense that they speak for larger groups, and employ existing and potential patterns of group solidarity to exert influence. These persuaders, in other words, “appeal to similarly situated persons, who ... have common identifications as members of groups; as physicians or working people or women or senior citizens or Southerners, or ultimately as members of a societal community – Americans or Japanese or Brazilians” (Mayew, 1997).

The source mix employed by journalists with respect to given news (and the relative prominence of professional experts within it) will generally vary on the basis of its topic. Journalists will draw on expertise that is relevant to subjects for planned stories (Rich, 2001). News regarding science and medicine will typically rely on technical experts more than “general news”. For example, with regard to environmental issues, scientists are the most quoted source and their credibility outranks that of other sources (Gregory & Miller, 1998; Vestal & Briers, 1999). Other factors that may impact the source mix will depend on the activism of other sources and the level of controversy regarding the topic. For example, Conrad (1999) found that UK and USA science reporters tend to contrast the views of researchers and scientists with those of advocate sources in the case of articles regarding the supposed genetic nature of homosexuality, whereas this does not happen in stories about the genetics of alcoholism or mental illness. In sum, the exact source mix that will be relied upon by journalists for every single story is an empirical question and hierarchies of credibility across different kinds of sources, far from being established once and for all, are subject to change. In most cases, however, expert sources will matter a lot.

The present discussion of the use of professional expert sources by media may continue by noting that a specialized literature exists that has examined with a great level of detail the relationship between journalists (often, the specialized ones rather than their “general assignment” colleagues) and the scientific sources they rely upon. Sociologists of science have long analyzed public understanding of science and considered the media as an important instrument for adult education, and specific

academic journals devoted to these issues exists<sup>6</sup>. To the extent that they may be generalized to other typologies of professional expert sources, research findings developed by these scholars shed light on different aspects of the (specialized) journalist-expert source relationship that, in spite of their considerable interest, are seldom addressed by media scholars.

More in detail, science journalists employ scientific experts to obtain the information needed to construct news stories or to get more background information over a given subject (van Trigt *et al.*, 1995). Since the stories they cover may vary a lot (e.g., an earthquake one day, the availability of new medicines the other), sources may considerably differ from story to story, e.g., a physics researcher in one case, a medical researcher in the other (Conrad, 1999). Ideas for news stories mostly derive from top-ranking peer-reviewed journals (e.g., *Science*, *Nature*, *Journal of the American Medical Association*, *Lancet*, *British Medical Journal*, *Proceedings of the National Academy of Science*), that are frequently scanned for newsworthy research findings. Press releases by journals or universities can have an impact on what becomes news (Conrad & Weinberg, 1996), but they are usually taken only as an introduction to the article or as an indicator of what the journals consider important (Entwistle, 1995).

Once a potential story is identified, science journalists look for experts (not necessarily those who authored the article) to better understand the details, context, and meaning of the new scientific discoveries. Science reporters today rarely meet scientists and researchers face-to-face, and depend heavily on the telephone for interacting with experts: journalists may develop long-term relationships with their sources without ever meeting them. Typically, for every single news story, more than one scientific expert will be located, in order to learn more and, to a certain extent, balance views. Different scientists may in fact have opposing view over a certain issue or phenomenon, both within a single discipline and across discipline. Within every scientific discipline, several paradigms may in fact coexist; further, scientists that share the same paradigmatic view do not necessarily agree over a given issue. Moreover, members of different disciplines have specific worldviews and taken-for-granted assumptions that

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<sup>6</sup> Among others, *Public Understanding of Science* and *Science Communication*.



facilitate the risk of disagreements over issues (Sabatier & Zafonte, 2001). For example, biologists perceive significantly greater risks in nuclear waste disposal than physicists, chemists, and engineers (Barke & Jenkins-Smith, 1993). For lengthy or more controversial stories, science reporters may end up calling dozens of experts to provide audience with a news story that takes into account all different points of views.

Research shows that a clear hierarchy of credibility exists for every given area of expertise: the place occupied by each professional expert will depend upon his/her credentials, reputation, and occupational prestige. The expert's scientific status and the number of scientific publications on a particular subject have been found to be important selection criteria (van Trigt *et al.*, 1994). While younger scientists are often more willing to talk with reporters, experts with recognizable names, titles, or affiliations are preferred. A source, when possible, should be the "top guy" in the field (Conrad, 1999; Hansen, 1994). Further, his institution should be of high standing, and a less expert scientist from a more prestigious institution may be preferred. According to one of Conrad's (1999) informants, for example "people love to quote someone from Johns Hopkins or Harvard or something like that, instead of the University of Iowa. Someone may be the world's expert on something at the University of Iowa ... but the Hopkins name reverberates with authority".

Clearly, a parallel exists between the hierarchies of reputation within occupational communities highlighted by sociologies of professions (par. 1.3.1) and the hierarchies of credibility here discussed: it must however be stressed that the two are related but do not coincide. For example, Shepard & Good (1987) found that only three of the ten scientists most quoted by the press in articles on the medical effects of marijuana published related research on top peer-reviewed outlets. While most of the experts quoted had less expertise than the average marijuana researcher, they appeared to have significantly higher standing in the wider scientific world. Mismatches of this kind may occur for several reasons.

- Firstly, source accessibility is an important attribute of "good" sources (Conrad, 1999), but world-level experts, because of time constraints, may be less accessible than younger or less reputed colleagues. Experts have little to gain

from talking directly with reporters (Dunwoody & Scott, 1982) and their institutions seldom employ public relation officers (Dunwoody & Ryan, 1985). Other experts fear that their comments will be taken out of context and that they will be misquoted or asked to comment on topic outside their area of expertise (Cameron, 1991, Dunwoody & Ryan, 1987), and thus refuse to be interviewed. Problems in the communication process between scientists and journalists derive from differences in professional culture, e.g., the rigor of peer review versus the entertainment demands of editors and audiences; the precision of jargon versus translating for interpretation by a lay audience, and so on (Peters, 1995; Myer Valenti, 1999). Sources that present information in a succinct, straightforward manner and use vivid expressions that lend themselves to quotability are often preferred by science reporters (Conrad, 1999). Difficulties in locating and accessing top experts, and the availability of lower rank but more helpful ones, may thus partly explain why journalists who cover science sometimes talk to sources that are low in reputation among their peer.

- Secondly, reporters may provide visibility to low-status experts because of the norm of objectivity that suggests balancing the different views over an issue. In this context, however, the norm is more relaxed than when covering policy issues. For most science reporters, scientific discoveries don't require balance, in part because they have already gone through the filter of peer review (Nelkin, 1987). Thus, very few science reporters would feel compelled to listen to a creationist when writing an article about evolution theory. When one or few scientists hold views that strongly contradict mainstream scientific opinion, however, journalists may feel that a newsworthy story that interests audience will result, with the effect of legitimizing "maverick" science (Dearing, 1995). Individuals who are low in reputation within the scientific community may thus have a prominent position in the media.
- Thirdly, although surveys of scientists find that the opportunity to promote themselves or to gain financial benefits is not a major reason to participate in a news interview (DiBella, Ferri & Padderud, 1991), experts who are low in status within their profession may somehow benefit from the popularity deriving from media visibility. This may be partly explained by using Bourdieu's (1997) idea

that the media (and above all, television) may provide a form of legitimacy to those that failed to obtain it, or did not have the patience to seek it, within academia (Marlière, 1988). Bourdieu is particularly critical of these “media intellectuals”, also because they are keen to engage in debates beyond their area of expertise<sup>7</sup> and to simplify scientific views in order to comply with the rules of the journalistic field (i.e., limited time or space to articulate positions; an easier language). Similarly, Eide & Ottosen (1994) suggest that “media sages”, i.e., interviewees who occur again and again in media reports, after previous interviews regarding their own areas of expertise, may accept to comment issues over which they are not expert. Research shows that trusted sources that previously provided lively comments tend to be contacted again and again by journalists (Entwhistle, 1995). It is not uncommon that journalists ask scientists about topics that are tangential or unrelated to their own field of research (Dunwoody & Ryan, 1987). Taken together, these results suggest that the experts employed by journalists, in most cases, will be selected from a rather small set of established leaders who are called upon regularly to comment on various scientific findings, some of which may sometimes range beyond their specific scientific expertise. Thus, by complying with the rules of the journalistic field, sources that are low in reputation among peers may nevertheless obtain a top position within journalists’ hierarchy of credibility.

Remembering basic results in social psychological research (par. 1.2), it should be noted that hierarchies of credibility for journalists “should” depend on *both* expertise and trustworthiness. Thus, if credentials, reputation and institutional affiliations may be employed to infer the former, other factors may account for the latter. The literature on the subject highlight two determinants of trustworthiness that may decrease the credibility of expert sources: (i) the defense of ideological positions in the case of policy disputes; (ii) the existence of conflicts of interests. As far as the former is concerned, although many scientists involved in policy disputes see themselves as objective technicians (Meltsner, 1976), others are employed by organizations that explicitly serve

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<sup>7</sup> Bourdieu (1997) refers to a specifically French debate that may not equally apply to other countries. Most UK or USA media-friendly intellectuals, for example, are only called by television networks to comment on topics that are directly linked to their area of expertise (Marlière, 1998).

identifiable ideologies or interests rather than neutral, objective enquiry (Weaver, 1989; Ricci, 1993; Smith, 1991). Are journalists able to discern ideological differences among sources of expertise? Rich (2001) found that “non ideological” expert organizations receive more, and more substantive, visibility on the US press than “ideological” experts, arguably because of credibility concerns by journalists. The area, however, is under-researched.

As far as conflicts of interest are concerned, in science they occur when scientists are expected to exercise judgment dispassionately but are instead motivated by financial, professional, or other types of interests (McNutt, 1999). The media have sometimes dedicated attention to the issue (e.g., McComas & Simone, 2003), and scientists’ own opinions on this kind of attention are quite varied. Some believe that the media dedicate *too much* attention to allegations of conflicts of interest among scientists, with the consequence of undermining the public belief in the integrity of science and support for funding particular areas of research (e.g., Cohen, 2001; Rothman, 1993). On the contrary, other scientists think that media attention to conflicts of interest in science is *not enough*, and that the credibility of science is at stake when these conflicts are later exposed (Schuchman & Wilkes, 1997). To what extent do media take into consideration conflicts of interest when selecting among sources? Van Trigt *et al.* (1994) found that one major criterion science reporters employ to select medical experts as sources about new medicines is their independence, i.e. “an expert should not have any interest in the company producing that drug unless their opinion is asked to illustrate the company’s view”. On the other hand, while it is relatively easy to discover if a scientist works for an institution that furthers a particular point of view (e.g., government, industry), the conditions that may put a scientific experts in conflict of interest are not generally visible to journalists<sup>8</sup>. Interestingly, Sprecker (2002) employed an experimental design and showed that in news articles, the credibility readers attribute to environmental scientists reporting research findings is not affected by the nature of funding of their research (i.e., public or private). If valid also for journalists, the implication would be that scientists benefit from such a reputation of neutrality and independence that the possibility of conflicts of interest is overlooked.

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<sup>8</sup> More on this in par. 2.3.

To sum up, the literature here reviewed provides considerable support to the claim that experts are influential sources of information upon which, very often, the media rely upon. Unlike other sources (i.e., public officials, advocates), professional experts provide news with what is often perceived as a neutral position grounded in “objective” knowledge (particularly in the case of scientific experts). For every given domain of knowledge, generally speaking, a hierarchy of credibility exists: since journalists (and readers) cannot employ sophisticated measures of expertise in order to assess the credibility of different expert claim makers, status-based criteria, grounded in institutional positions will be employed. Hierarchies of reputation within the profession and hierarchies of credibility among journalists, however, will hardly coincide. Finally, besides (inferred) expertise, credibility will depend on the fact that a source be considered trustworthy. Limited empirical evidence supports the idea that “ideological” experts’ points of view will be discounted by journalists. Conflicts of interests, on the other hands, are less visible to journalists, that probably assume (most often than not) that scientific experts working for non “ideological” organizations are neutral and independent. Sometimes, however, conflicts of interests are reported by the media and this may reduce the reputation of both individual experts and the profession as a whole.

#### 1.4.2. *Specialized journalists as experts*

The literature discussed in the previous section refers to experts who are relied upon as sources on an occasional basis. Some experts may become part of journalists' networks of trusted sources and appear quite often on the media; in other cases, they (or the organizations that employ them) may benefit from their media visibility. Their primary occupation or professional activity, however, has nothing to do with the media. In other cases, expert sources cooperate with media on a more stable manner. For example, many contemporary arts critics are also full-time or part-time journalists for newspapers, general and specialized (i.e. arts) magazines, and television (Poli, 1999). Similarly, security analysts very often provide their advices on stocks to the general public of investors through newspaper columns. In these cases, since also among media organizations hierarchies based on reputation exist, media affiliation may become one credential that adds to the expert's reputation among the general public and perhaps even among colleagues. Thus, a critic working for a national diffusion newspaper will be more reputed than those affiliated with local newspapers. A security analyst who writes for *Business Week* will be considered more expert than those who diffuse their opinions by means of less prestigious outlets. Experts of this kind have been investigated by specialized literatures (see chapter 2). Media studies (sometimes with the help of other disciplines) help however shedding light on a last category of expert: the specialized journalist.

Specialized journalists have an educational background and / or a professional experience thanks to which they acquire significant expertise over the matter they cover, be it science, health, computers, motors, sport, architecture, lifestyle. Unlike the experts that work on a regular basis in media outlets, for specialized journalists involvement with the media is the main occupation, and not an accessory activity. For occupational communities that have not achieved full professionalization, the line that separates specialized journalists from critics may in effect be quite blurred; for example, it is hard to distinguish a wine critic from a wine journalist. In some cases, specialized journalists will be employed by "general" media, where they will be assigned to cover stories within their area of expertise. In other cases, they will work for special-interest media

targeting consumers (e.g., women's magazines, sports newspapers; cable television networks dedicated to arts) or for professional or corporate audiences (e.g., the wood-working industry; marketing managers; aeronautic engineers; public relations professionals; cardiologists). Finally, it must be noted that while the professional values underlying some typologies of specialized journalism stress *public interest* (e.g., science or medicine journalism), others are most concerned with *entertainment* (e.g., lifestyle journalism), although in most cases both are present with different weights (Zoonen, 1998). This distinction is consequential, since an orientation to entertainment "produces a frame of reference for journalists that is said to be characterized by interesting (as opposed to 'important') issues, convenient and practical information, commitment and emotionality (rather than objectivity and rationality)" (Zoonen, 1998: 126).

One reason behind the fact that, from a marketing perspective, specialized journalists are of considerable interest resides in the fact that very often they act as product reviewers. In other words, in their search for newsworthy stories to cover, these journalists will decide whether to cover a new product or not and will comment on its quality vis-à-vis that of other purchase alternatives. In some cases, particularly when working for outlets specialized in providing advice to consumers for problematic purchase decisions, they will rate or rank products on the basis of their relative quality, as in the case of movies, wines, restaurants, hotels, universities and business schools. Consumers value these supposedly expert and trustworthy sources of information<sup>9</sup>.

For a number of specialized journalists, some empirical research exists, grounded in a number of different disciplines and bodies of knowledge, as shown in Table 1.2. In the cases of science journalists, fashion and lifestyle journalists, and sport reporters, a significant body of knowledge has been accumulated over the years, because of the existence of specialized outlets and/or the journalists' relevance for questions of theoretical interests. For other typologies of specialized journalists, the available research is much more limited and occasional. Prominently, almost all the available literature refers to journalists working for media organizations targeting consumer audiences; journalists working for outlets targeting professional and corporate

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<sup>9</sup> For a more accurate discussion of the consumer behaviour literature, see chapter 3.

audiences are instead under-investigated. Further, there is an imbalance towards the press respect to other media. As a whole, these bodies of knowledge tend to be very focalized and not to look at each other. In some cases (but not always), reference to key contribution in media studies is made, in an attempt to assess differences between specialized journalists and their general assignment colleagues.

**Table 1.2 – Available research on specialized journalists**

<b>Journalist specialization</b>	<b>Disciplines / Areas of enquiry</b>
<b>Science journalists</b>	– Sociology of science
<b>Fashion and lifestyle journalists</b>	– Sociology of fashion
	– Gender studies
	– Health research
<b>Sport reporters</b>	– Sociology of sport
<b>Other</b>	– Media Studies
	– Sociology

*Science journalists*<sup>10</sup>, as noted in the previous section, are investigated by both students of media and sociologists of science. The interest of the latter depends upon the fact that these professionals mediate the flow of knowledge that originates from scientific sources and reach the general public. More in detail, the most debated issues in this field are: (i) coverage of science by journalists (and their media); (ii) problems in, and ways to improve, science communication; (iii) characteristics and working practices of journalists; (iv) source-journalist relationships. As far as the *coverage of science by the media* is concerned, it must be said that public awareness, understanding, and eventual support for science have been long believed to be inextricably linked to news coverage of scientific activities (Burnham, 1987; Trachtman, 1981). The mass media are often accused of not allocating adequate space to scientific topics, of being inaccurate in reporting about the issues, and indulging in dramatization and sensationalism (e.g., Friedman, Dunwoody & Rogers, 1986; Guizzardi, 2002). Put differently, media are a

<sup>10</sup> Science is here employed in a broad sense, to also include, *inter alia*, medicine and health reporter, environmental journalists, etc.



“dirty mirror” of science (Bettetini & Grasso, 1988; Bucchi & Mazzolini, 2003). The resulting preoccupations originated a stream of contributions, mostly based on content-analysis of relevant media over appropriated periods of time, to assess how much coverage is devoted to scientific research in general and to specific disciplines (e.g., Nelkin, 1987; Logan, Zengjun & Fraser Wilson, 2000; Bucchi & Mazzolini, 2003) or, more narrowly, to specific issues (e.g., cloning, Holliman, 2004). In other cases, mass media content is compared with scientific sources (e.g., articles on peer-reviewed journals) in order to detect patterns of inaccuracy by scientific journalists (e.g., Kua, Reder & Grossel, 2004).

With respect to *problems in science communication*, research has highlighted the fact that a part of the responsibility lies in the scientists themselves. They are not always available for speaking to journalists. Differences in professional values render problematic the scientist-journalist relationship. Moreover, journalists speak their own jargon: “scientific language has diverged from the mainstream of literary language and divided into a large number of small, winding tributaries” (Shortland & Gregory, 1991). There are not many scientists who are able to render their language accessible to journalists and audience. Aware of these problems, many contributions deal with these problems and ways to solve them in order to foster scientist-journalist relationships of mutual benefit (e.g., Myer Valenti, 1999; Treise & Weigold, 2002).

Finally, a number of studies have tried to identify *characteristics and working practices of science journalists*. These studies are typically based on qualitative interviews or, less frequently, on surveys and, over the years, have been replicated in a number of countries (e.g., Eide & Ottosen, 1994; Hansen, 1994; Metcalfe & Gascoigne, 1995; Finer, Tomson, Björkman, 1997; Saari, Gibson & Osler, 1998; Sachsman, Simon & Myer Valenti, 2002). These contributions provide basic descriptive statistics about journalists, e.g., educational background, (lack of) knowledge about scientific issues, and their relative level of specialization (i.e., full-time scientific journalists or general assignment journalists that also cover scientific stories): all variable that affect the accuracy of scientific reporting. An other aspect investigated is how journalists select among possible stories and sources. Specialized journalists risk to be overwhelmed by

the mass of press releases, letters, promotional material and telephone calls from individuals or institutions anxious to get coverage. Stories with human elements, controversies, of potential interest for readers are most likely to be covered.

As far as the *source-journalist relationship* is concerned, the source mix employed by science journalists includes scientists, government, industry spokesperson, lay persons. Scientists are not always eager to be interviewed and “translatory” work is often needed to render their ideas understandable to readers (see par. 1.4.1). Some sources (advocate groups and industry) employ public relation strategies in order to obtain more and better coverage. Pressures from advertisers are seldom researched since they do not appear to constitute an issue. “Internal” problems of these journalists may come from time constraints, short-term editorial planning, and the relationship with news editors that may reduce the journalist’s autonomy, pressure him/her to routinely produce “interesting stories”, and the like. Finally, science journalists are a tight occupational community and, very often, they develop relationships with other science journalists working for different organizations that are stronger than those developed with colleagues within their own organization.

*Fashion and lifestyle journalists* have been investigated in the context of different disciplines that, for a reason or another, attribute them theoretical or practical relevance<sup>11</sup>. Broadly speaking, and with specific reference to the press, in this category two types of specialized workers may be identified: “those who write” (editors), and “those who make images” (stylists). The former may work for both dailies and magazines, while the latter are typically employed by (or work freelance for) magazines only, where they are responsible for styling editorial shoots, working alongside a photographer, to produce an appropriate set of images. Since most of these magazines are primarily “to be looked at” (McRobbie, 1998), the role of stylists is prominent, since they take decisions about, *inter alia*, the models, their hair and makeup; the set; the overall attitude of the (visual) story. A prominence that contrasts with the fact that almost no scholarly contributions exist on their work (Hartley & Rennie, 2004, is a rare

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<sup>11</sup> Thus, the corpus of knowledge about fashion/lifestyle journalists is more fragmented than in the case of science or sport journalists. For this reason, the discussion that follows is structured in terms of disciplines rather than research questions.

exception). More specifically, *sociologists of fashion* have highlighted the role played by fashion editors in the diffusion of new fashions. Today, fashion diffusion is highly organized and managed within interorganizational fields composed of a plurality of key actors: designers, fashion editors and stylists, department store buyers, owners of trendy fashion boutiques, celebrities, fashion-conscious consumers. Specifically, fashion editors (particularly those working for the higher-status outlets) select from the many ideas that are presented by fashion designers during their biannual shows those which are more in touch with the dominant culture, and promote them as trends (Crane, 1999).

Other scholars have examined the discourse about fashion realized by the specialized journalists that write about fashion in newspapers. For example, Rocamora (2001) found that while *Le Monde* writers tend to conceptualize fashion as high culture, and designer as artists, the journalists writing for *The Guardian* depict fashion as popular culture and designers as stars. Other contributions have analyzed the role played by the editor-in-chief of fashion/lifestyle magazines. O'Shea Borrelli (1997), for example, analyzed the writing of three editors-in-chief of US *Vogue* in the period between 1969 and 1993, and found that each of them developed distinctly individual styles and conceptions of fashion, e.g., whereas Diana Vreeland celebrated the transformative aspect of clothing and encouraged others to do so, Grace Mirabella was concerned with function and practicality, or "real clothes for real people". Similarly, Gough-Yates (2003) and Ouellette (1999) discuss the role of the editor-in-chief of UK magazines as lifestyle models for their audiences. In spite of their relevance, however, among sociologists of fashion it is clear that fashion editors are not fashion critics. "Whereas a prestigious theater critic or art critic can make or break a play or gallery exhibition, a writer on clothes fashions exercises no such power. To the extent that some of the fashion press aspire to such influence, the expectations of publishers, advertisers, and readers ... usually conspire to dilute their "criticism" to little more than reportage" (Davis, 1994: 124).

*Gender studies* have analyzed women's magazines since the 1960s. The academic writing that accompanied the feminist movement emphasized how media

depictions play a role in the socialization of young women and men, in ways that foster women's oppression and socialization into subordinate role. A key form of cultural oppression lies in the distorted, narrow image of women (i.e., impossibly thin bodies, focus on appearance and relations with men) presented in advertisements, feature articles, and stories in women's magazines (e.g., Silverstein et al., 1986; Peirce, 1990; Evans et al., 1991; Wiseman et al., 1992;). The emergence in recent years of men's lifestyle magazines (e.g., Men's Health) has also originated some research devoted to their analysis (e.g., Stibbe, 2004; Boni, 2002; Stevenson, Jackson & Brooks, 2000). While different scholars may take more or less critical stances, most of them suggest that women's and men's magazines play an important role in the social construction of masculinities and femininities. In a similar vein, *health research* suggests the media images are powerful forces shaping appearance standards. Thus, repetition of images of thin females and muscular males makes these idealized body shapes seem the standard, even though they do not reflect population norms (Thompson et al., 1999). To the extent that they are internalized, these images may influence body image dissatisfaction and disordered eating (Field et al., 1999; Thompson & Stice, 2001; Jones, Vigfusdottir & Lee, 2003).

While central for both gender and health studies, most empirical research concerned with women's and men's lifestyle magazines is based on analyses of their content and of reader response. Only few contributions have tried to open the "black box" of media organizations, perhaps because, as it is sometimes argued, media workers may be reluctant to discuss problematic issues (Davis, 1997). A few exceptions, however, exist. Milkie (2002) found that female editors find legitimate the "real girl" critique (i.e., the images in their magazines show "impossibly thin" girls), but claim a lack of control over change because of the aesthetic norms enacted by photographers and the influence of advertisers that prefer that editorial pages have an atmosphere that remembers their advertisements. The latter point is strengthened by Steinem (1990), who describes the problems a women's magazine editor had with advertisers, that included "insertion orders", or recommendations of avoiding some topics (e.g. sex, drugs, also for educational purposes) because of the possible risk of alienating some audience segments. Advertiser involvement in editorial decision, that was also noted by

sociologists (Davis, 1994), is thus stigmatized in gender and health literature for its consequences over the social construction of gender roles and appearance standards.

*Sport journalists* have mostly been investigated by sociologists of sport. Sports journalism is usually considered more concerned with entertainment than with public interest (Zoonen, 1998). The status of sport department within media organizations has been found to be lower than other professional specialties (Rowe, 1999). Much of the available literature regards sports reporters, whereas a more limited scholarship regards radio and television sport commentators (Barnett, 1990; Whannel, 1992; Haynes, 1998, 1999). Research questions investigated by these scholars, as a whole, are similar to those discussed in the cases of other specialized literatures: (i) coverage patterns; (ii) characteristics and working routines of journalists; (iii) relationship with sources. As far as *coverage of sport* is concerned, it must be said that much like in science reporting, the media are selective in their coverage decisions: some disciplines, teams, individual athletes are prominent in the media, while other are marginalized (Whitlam & Preston, 1998). The latter are damaged by the lack of media attention, since visibility attracts spectators. Marginalization occurs because journalists employ an informal and taken-for-granted hierarchical categorization of sports, events, teams, based on expected audience interest (Knoppers & Elling, 2004). Thus, top division men's soccer could be televised also in case of poor performance, whereas the World Championship of a niche sport could hardly obtain a few minutes coverage. Besides taken-for-granted notions of interest for audience, also personal preferences play a role in coverage selection: for example, Knoppers & Elling (2004) find that according to journalists approximately 15% of coverage is based on own preferences, particularly in the selection of "fillers". Thus, according to one of their respondents: "[Y]ou always have some stories from which to choose. From the ten stories you can choose about three. I will then be more apt to choose a story about athletics while a colleague may select a report about sailing or billiard".

Another much debated area regards gender bias in sportcasting and sport reporting, which is part of the more general feminist critique of sport as a sexist institution, male-dominated, which naturalizes men's power and privilege over women

(Sabo & Curry Jansen, 1992). Much like in the case of women's magazines, also the representation of women in sport is believed to affect the way women see themselves and how they are viewed (and treated) by others. Broadly speaking, the literature regarding women, sport, and the media addresses two main issues (Bernstein, 2002): the amount of coverage and manner women's sports and female athletes are covered. With respect to the former, a number of studies (e.g., Creedon, 1994; Eastman & Billings, 1999; Harris, 1999; Tuggle & Owen, 1999) clearly show that women are underrepresented, although in more recent years they have gained more media visibility, particularly in major sporting events as the Olympic Games. With respect to the type of coverage that women receive, however, research shows that the media descriptions of female athletes reproduce gender stereotyping (Sabo & Curry Jansen, 1992; Koivula, 1999). For example, women's athletes are often described in terms of appearance and attractiveness rather than physical prowess, and the language used by commentators tend to acknowledge male athletes as adults while female athletes are infantilized (i.e., girls or young ladies / women vs. man or old fellow / man). Further, not only sport coverage is gendered, but also sport journalism is "a man's world", where female reporters find it difficult to be accepted (e.g., Deuze, 2001; Ordman & Zillman, 1994; Ross, 2001; Salwen & Garrison, 1998). Field studies of sport journalists suggest that the reproduction of gender stereotypes may be also explained by the institutionalization of working routines and by commercial logic (Theberge & Cronk, 1986; Herman & McChesney, 1997; Lowes, 1999). For example, Davis (1997) showed that the sexualized manner in which one issue of *Sports Illustrated* devoted to swimsuits depicted women was mainly due to the intent of meeting the perceived interest of readers in order to boost sales. Thus, to use the words of one of Knoppers & Elling's (2004) informants: "beautiful women sell".

As far as *characteristics and working routines* are concerned, sport journalists are characterized by a closeness to sources for news (athletes, owners, managers, agents), an overlap of interest in and knowledge about sport between journalists and their sources, and an identification with the audiences; in addition, sport journalists are sometimes required to be subjective, i.e. when they cover international matches involving their countries, in overt violation of the objectivity norm (Rowe, 1999; Boyle

& Haynes, 2000; Edworthy, 2000). The field is not yet fully professionalized, and (even though less frequently today) ex athletes and passionate supporters may be considered to own sufficient expertise to become reporters. Recent developments have been problematic for some journalists, whose backgrounds do not permit them to fully understand the business aspects of professional sport (e.g., Boyle, Dinan & Morrow, 2002).

Finally, as far as *relationships with sources* are concerned, sports journalists operate in a closed world, in which they rely heavily on other sport journalists, teams' spokespersons, athletes, and agents as sources of information (Rowe, 1999; Boyle & Haynes, 2000; Edworthy, 2000). In sports that are aggressively marketed (e.g., football/soccer), PR have increased their influence. Moreover, also individual athletes, that more than in the past are considered celebrities, have started relying on professional public relations in order to exploit commercially their image (e.g., as endorsers in advertisements). Dependence from sources for information and access to athletes for interviews makes it difficult for journalists to level criticism.

Other kinds of specialized journalists have instead been neglected by media scholars and sociologists. A systematic review of media studies reveals less than a handful of contributions. A few of them regard *popular music journalism* (Jones, 1992; 1993; Forde, 2001). Of interest here, Forde (2001) suggests that today's UK popular music journalism has impoverished its contents over the years. The famous rock writers of the 1960s and 1970s were "personality journalists", rather autonomous in their selection choices and critical evaluations. Today, on the other hand, bureaucratization of publishers led to decreased journalist autonomy whereas, at the same time, more magazines have entered the market and the wider print media also try to access celebrity artists. These conditions permit press officers to gatekeep (quantitatively and qualitatively) journalistic access to their artists. Thus, from their vantage position, press officers of pop stars may "screen" journalists, negotiate interview agendas and even put a veto on issues that journalists should refrain from asking. Pragmatic journalists tend not to challenge this "Hollywood approach to press management", to avoid the risk of being blacklisted.

*Travel journalism*, in spite of the fact that tourism is an important area of sociological investigation, has been theoretically discussed only by Fürsich & Kavoori (2001). The authors note the “special contingencies” of travel journalism: public relation saturation from the private tourism industry and government-sponsored tourism departments and media reliance from advertiser within the tourism industry itself. Further, free trips and other inducements for travel journalists are common (Weir-Alderson, 1988).

To recap, sociologists and media scholars have selectively investigated some typologies of specialized journalists while neglecting other. In most cases, reference to key contributions in “general” media studies is made: for example, most studies dealing with specialized source-journalist relationship make reference to, *inter alia*, Tuchman’s (1972) discussion of the norm of objectivity or to agenda-building theory. Typically, however, they have not looked at each other, in spite of the recognizable patterns that are easy to identify when conducting a comparative review: (i) specialized journalism is often found to be a “dirty mirror” (Bettetini & Grasso, 1988; Bucchi & Mazzolini, 2003) of reality: for example, scientific results are reported inaccurately and fringe voices within the scientific debate are given too much prominence; women are thinner (and men more muscular) than most “real” people; male athletes are provided with disproportionate visibility than their female colleagues; (ii) the working practices of specialized journalists are scrutinized to gather knowledge on how to influence selection processes; (iii) the source mix is investigated, and hierarchies of credibility are established; (iv) the power of advertisers and professional public relations in influencing media content is noted, particularly in the case of “leisure” journalism (e.g., fashion and lifestyle, sports, popular music), whereas for public interest journalism (e.g., science, medicine) influence appears to be less prominent (at least, to the extent that academic research faithfully mirrors reality).



#### 1.4.3 – *The mediated influence of expert sources and specialized journalists*

Opinion makers diffuse their opinions and world-views through the media. To what extent do they influence audiences? This is a tough question to answer, since within media studies, highly differentiated paradigms co-exist, that show considerable diversity in the assumptions made on the relationship between media and society (McQuail, 1994). The main purpose of this paragraph is to discuss the theories more instrumental in explaining extension and limits of opinion maker influence over audiences.

Mass communication scholars, for several decades, have shown that the media “to a large extent constitute social reality and normality for purposes of a public, shared social life, and are a key source of standards, models and norms” (McQuail, 1994), particularly when the public lacks firsthand experience of the many events that take place in our increasingly globalized world. The roots of this view may be historically traced to the cultural climate of the 1930s, when it was feared by most intellectuals that persuasive campaigns diffused by mass media (particularly radio) had powerful and instantaneous effects on people opinions, attitudes and behaviors: a fear that was reinforced by the success of the Nazism’s propaganda in Germany and the large-scale panic in the USA caused by Orson Wells’ radio program “Invasion from Mars” (Cantril *et al.*, 1966)<sup>12</sup>. In accounts of this period, as a consequence, media were thought as a very powerful force capable of rapidly influencing mass opinion and behaviors. Empirical research on audiences over time revealed that the influence of media on society was not so overwhelming, and for two main reasons. Firstly, mass media may reinforce people’s existing attitudes and opinions (or even create new ones), but they could hardly convince people to change already strongly held beliefs (Klapper, 1960). Secondly, although media may reach everyone, their influence does not: social processes intervene to mediate influence. This “limited effect” view was however later challenged by new theories that ascribed media with a greater influencing power: of

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<sup>12</sup> “Invasion from Mars” was broadcasted without any prior warning, and was so realistic that many people actually believed that Martians had landed on Earth. The panic was so extreme that some even committed suicide.

these, those I consider more useful in explaining opinion maker influence over society are the agenda setting and media discourse theories.

*Agenda-setting theory* (McCombs & Shaw, 1972; Benton & Frazier, 1976; Iyengar & Kinder, 1987; Rogers & Dearing, 1988), which is a very influential perspective in media studies, suggests that the media may influence public perception of the importance of issues. The theory develops Walter Lippman's (1922) observation that mass media act as a bridge between "the world outside and the pictures in our heads". In agenda setting research, news content is conceptualized as an agenda of items (most frequently, the public issues of the day), and the theory describes and explains the transfer of salience from this media agenda to the public agenda. Typical research designs in agenda setting research consist of an examination of the pattern of news coverage over appropriate periods of time, that is subsequently compared with the public agenda, thanks to survey to populations of interest. An often employed question to elicit respondents' agenda is "What is the most important problem facing this country today?". First verified during the 1968 US presidential election, "there are now more than 300 empirical studies worldwide documenting agenda setting effects" (McCombs, 2001).

Over the years, researchers have identified two levels of agenda-setting effects. Initially, the theory focused on the items (e.g., public issues, political candidates) defining media and public agendas. Media coverage of such items, however, includes descriptions of such items: just as items vary in salience, so do the attributes of these items: this means that, in mass media presentation of such items, some of their attributes will be emphasized whereas others will be mentioned less frequently or totally neglected. For example, media accounts of a Hollywood movie star could very often mention that she won an Academy Award, but very seldom mention her past drug problems of the past. To sum up, then, the influence of the media on the relative salience of items among the public is a first level of the agenda setting; the influence of the media on the relative salience of these items' attributes is the second level of agenda setting (McCombs, 2001). This two-level articulation of agenda-setting effects consequently imply a revision of the often quoted Cohen (1963) comments that the

news media “may not be successful much of the time in telling people what to think, but ... [are] stunningly successful in telling ... readers what to think about”. Such an observation remains valid at the first level; at the second level, however, media effects on public attitudes and opinion are considerably reinforced.

Agenda setting theory may be employed to explain the impact of specialized journalists over audiences. For example, first-level agenda setting effects have been found in the case of environmental issues (e.g., Chan, 1999). It must however be said that this influential perspective in mass communication is not very much diffused in specialized journalism research. Although agenda-setting theory does not expressly distinguish among sources, to the extent that expert source participate to the characterization of issues, they may participate to both first- and second-level agenda setting effect. As previously noted (see par. 1.4.1), agenda setting theorists addressed the problem of sources with subsequent studies focusing on agenda building and patterns of source access to media (e.g., McCombs & Bell, 1996; McCombs, 2001). The theory does not however consider the relative credibility of sources (i.e., experts vs. non experts). *Media framing theory* (Pan & Kosicki, 1993; Scheufele, 1999), on the other hand, is more direct in acknowledging the different typologies of sources. Overall, the theory refers the ability the media have to frame messages regarding social issues.

The concept of framing (i.e., meaning construction), as used in sociology, is mainly based on the work of Goffman (1974), that considers frames as “schemata of interpretation that enable individuals to locate, perceive, identify, and label” events of which they have direct or indirect experience. Frames permit people to make sense of reality because they organize events in understandable and recognizable patterns, thus enabling the identification of corresponding strategies of action. The mass media are a major arena for defining and framing social problems (Best, 1990, 1991; Gamson & Modigliani, 1989; Gitlin, 1980; Tuchman, 1978). When describing social phenomena, media writers employ frames to “selectively represent certain elements of their stories” (Gamson & Modigliani, 1989) and to emphasize some information to the exclusion of other data” (Binder, 1993). Framing processes create dominant reading of issues, and reduce readers’ capability to comprehend the text in a different way (Entman, 1991).

This means that media frames “organize the world both for journalists who report it and, in some important degree, for us who rely on their reports” (Gitlin, 1990).

Frames are not static, but evolve over time. Moreover, many opposing frames may contemporarily exist, each of them supported by the activities of organizations which assume the role of sponsors, through “speech making, interviews with journalists, advertising, article and pamphlet writing, and the filing of legal briefs to promote a preferred” frame (Gamson & Modigliani, 1989). The reason behind such activities is the need to “mobilize potential adherents and constituents, to garner bystander support, and to demobilize antagonists” (Snow & Benford, 1988). In order to foster consensus and action, sponsors have to perform three interrelated “core framing tasks” (Benford & Snow, 2000): (i) diagnostic framing (i.e., the identification of some problematic condition or situation that is in need of change and the making of attributions regarding who is to blame); (ii) prognostic framing (i.e., the articulation of an alternative set of arrangements); (iii) motivational framing (i.e., the urging of others to act in concert in order to affect change). For example, an environmental organization could suggest that the Earth is in great danger because of industrial pollution; that the problem may be solved by a more strict environmental regulation; and that concerned citizens may be a part of the solution by participating to a sit-in aimed at stimulate policy makers to adopt appropriate measures.

Under this theoretical perspective, media are thus considered as “a site on which various social groups, institutions, and ideologies struggle over the definition and construction of social reality” (Gurevitch & Levy, 1985: 19). This idea is similar to that proposed by the sociology of news sources (Schlesinger, 1990), where sources are conceived as belonging to competitive fields that fight for media attention. In media framing theory, however, sources are “primary suppliers of frames” and journalists and editors, when trying to make sense of social phenomena, often use the frames made available to them by social activists, vested-interest groups and, of more interest for us, *professional experts* (Shibley & Prosterman, 1998). Such experts are important because a major determinant of a frame resonance (i.e., effectiveness) is the empirical credibility of the proffered frame *and* the perceived credibility of the frame articulators or claim

makers (Benford & Snow, 2000). With specific reference to the latter, this means that “the greater the status and / or perceived expertise of the frame articulator and/or the organization they represent from the vantage point of potential adherents and constituents, the more plausible and resonant the framings or claims” (Benford & Snow, 2000). Advocates’ frames may thus be “discounted” by journalists preferring experts’ views over an issue. Deacon, Fanton & Bryman (1999) found for example that the UK newspaper covering the “false memory of abuse” controversy that opposed the *British Psychological Society* to the *British False Memory Society* (composed by parents who had been accused of childhood sexual abuse by adult children after therapy) privileged the definition of the issue proposed by the former because of the vested interest behind the position of the latter.

As a consequence, from the point of view of those supporting a specific claim, a “rhetorical mode based on signals of credibility [consists] in locating speakers in an institutional structure that enhances their claims to expert, objective knowledge” (Mayhew, 1997). For example, the battles over the regulation of transportation fought in US during the 1970s were won by advocates of deregulation also because of the influence of free-market economists based in prestigious universities that repeatedly asserted that deregulation was technically correct economics (Derthick and Quirk, 1985; Quirk, 1990). This use of expert knowledge to mobilize the public opinion and affect policy making may stimulate the emergence of markets of expertise, as suggested by the development of the so called “think tanks” in US (Rich, 2001; Mayhew, 1997). Experts that are “employed” this way, however, as previously suggested, may find themselves in the position of conflict of interest and risk to undermine their own and their profession’s credibility.

Media framing theory, although not always referred to, is compatible with a number of studies regarding specialized journalism and its sometimes subtle impact on audiences. Thus, although not all powerful, science journalists together with their scientific sources, are co-responsible for the framing, *inter alia*, of stem cell research or biotechnologies as a scientific or ethical issue (Nisbet & Lewenstein, 2002; Nisbet, Brossard & Kroepsch, 2003), and of passive smoking as a social problem (Malone,

Boyd & Bero, 2000). Fashion, lifestyle and even sport journalisms have been considered as having a powerful effect in framing femininities and masculinities (e.g., Sabo & Curry Jansen, 1992; Boni, 2002; Milkie, 2002). Sport journalism, on the other hand, may frame the doping debate and even affect drug policy (Denham, 2004).

To sum up, both agenda setting and media framing theories predict significant media effects over audiences. This view is contrasted by other theoretical perspectives within media studies which suggest that the media (and thus also the experts diffusing their opinions through the media) have much more limited effects. Among these, Lazarsfeld, Berelson & Gaudet's (1944) well-known *two-step flow of communication* model is prominent. The authors proposed that "ideas often flow from radio and print to opinion leaders and from them to the less active sections of the population". In a cultural context characterized by a widespread belief that media effects over population opinions, attitudes, and behaviors were very powerful, the model revealed the limits of media influence, and the role played by interpersonal influence in mediating such effects. In extreme synthesis, Lazarsfeld and his colleagues unexpectedly found that: (i) interpersonal communication had a stronger impact on individual attitudes than the mass media alone; (ii) some individuals (who were more exposed to the media) acted as intermediaries between the media and the public; (iii) these intermediaries, defined as opinion leaders, could allow media message to pass through (backing them with their personal influence), strengthen or weaken them, or block them entirely. As a consequence of these findings, a two-step flow, from the media to opinion leaders, and from opinion leaders to their "followers", could be postulated.

Later investigations (Katz & Lazarfeld, 1955), published in *Personal Influence*, examined in more detail four areas of decision making in daily life: marketing, fashion, public affairs, and movie selection. The two-step flow of communication model and the notion of opinion leadership have been very influential in social science, with applications (and overall convincing empirical evidence) in various disciplines including marketing and consumer behavior, fashion, politics and voting, family planning, science and scientific innovations, agriculture, and health care (see Weimann (1994) for a review of more than 1,400 of these studies). Over time, the model has been

criticized both on theoretical-ideological and empirical-methodological grounds; this criticism has however resulted in several modifications to the original formulation, including the introduction of new and more valid measures of opinion leadership, the introduction of multi-step (rather than two-step) flows, and the merging of the model with modern network analysis (Weimann, 2001; 1989).

Since the early studies, several psycho-social characteristics of opinion leaders have been identified (Katz, 1957; Weimann, 2001). More in detail, opinion leaders: (a) are found at every social level and in most areas of decision making; (b) tend to influence people from the same social level; (c) are found in both of the sexes, all professions, all social classes, and all age groups; (d) tend to be more involved in various social activities and social organizations and occupy central positions in their personal networks; (e) are considered to be experts in their field, but this is an *informal recognition* by close friends, relatives, co-workers, colleagues, and acquaintances; (f) are more exposed to the mass media than non leaders; (g) are more interested, involved, and updated in the field in which they are influential; (h) tend to be “monomorphous”, i.e. they are typically expert in one area but rarely in different areas (“polymorphous”); (i) manifest a specific communication behavior, i.e. they are more involved in formal and informal personal communication than non leaders; (j) are usually well aware that they serve as sources of information and influence for others.

It is now clear that both similarities and differences exist between opinion leaders and opinion makers<sup>13</sup>. Firstly, both tend to be expert over an area of interest. Opinion makers, however, have an expertise that is the result of formal training and deliberate practice, and is backed by credentials of different types. Most of the time, opinion leaders' credibility will be instead grounded in experience, rather than expertise, and as previously suggested (par. 1.2), the two concepts are orthogonal. A car opinion leader is not an automobile engineer, after all: they may be both asked to

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<sup>13</sup> It is worth emphasizing differences since it is not uncommon to find scholarly contribution that, for lack of more appropriate terms, define experts or specialized journalists as opinion *leaders*. It is for example the case of Crane (1999), who define fashion editors as “key opinion leaders) and Leonard-Barton (1985) who consider professional experts employed as media sources as opinion leaders. Other authors instead distinguish “technical” from “peer” opinion leaders (Locock, Dopson, Chambers & Gabbay, 2001).

comment on car security, but the premises upon which their opinions are build are different. Secondly, in both cases the area of competence tend to be one and no more than one. As previously suggested (par. 1.1), in most areas of knowledge it takes at least 10 years (if not more) to acquire expertise and, moreover, the intellectual division of labor system encourages specialization; symmetrically, empirical findings by Katz & Lazarsfel (1955) suggest that "polymorphous" opinion leaders tend to be very rare (e.g. they found that only 10% of women were opinion leaders in two fields; and only 3% in three). Thirdly, while both opinion leaders and expert may be credible and hence exert social influence, in the case of the former this occurs through a direct, face-to-face interaction. Thanks to the media, instead, experts become able to influence audiences much broader than their immediate social network.

The idea of two-step flows of communication has been influential in the sociology of diffusion (Rogers, 1995), whose home territory is the innovation. In this field, scholars have investigated the structural mechanisms that promote diffusion. The most central opposition is between external source or broadcast models (diffusion *into* a population) and internal or contagion models (diffusion *within* a population) (Strang & Soule, 1998). Experts and specialized journalists (i.e., opinion makers) may be considered key external sources of diffusion. Research in organization studies, for example, shows that high levels of media attention speed the introduction of innovations like matrix management (Burns & Wholey, 1993) and prompts merger and acquisitions (Haunschild & Beckmann, 1997), by providing information that complements that obtained via intraorganizational ties. Similarly, expert sources in the professions and other occupational communities often diffuse through the media their self-interested theories that legitimate new practices and behaviours (see par. 1.3). Internal diffusion processes, on the other hand, operate via information and influence flowing within the adopting population, as evident in the opinion leadership model. External and internal sources may work in tandem, contrasting or reinforcing each other. For example, in fashion diffusion, sometimes a style enthusiastically supported by leading fashion editors is instead rejected by consumers (Davis, 1994: 126; Crane, 1999). On the other hand, the impossibly thin or muscular appearance standard among adolescent girls and



boys is strengthened by both exposure to lifestyle magazines and appearance conversations with friends (Jones, Vigfusdottier, & Lee, 2004).

To recap, the media are an important institution in contemporary societies. Although their effects are less strong than initially thought, different theoretical perspectives suggest that the media may significantly affect public opinion and attitude over public issues: thus, the media participate in the social construction of reality. Experts and specialized journalists, to the extent that their opinions are amplified by the media, contribute to such social construction.

#### *1.4.4 – Opinion makers and internal dynamics of the media system*

Professional public relations and advertising influence, as previously noted in a number of occasions, may exert considerable influence over media content. Journalists (specialized and non specialized) may be particularly vulnerable to their pressures; the same may be said for those experts cooperating with the media on stable basis (e.g., a movie critic who has a regular column in a newspaper). While expert sources are in general considered more credible by journalists, these influences may affect the source mix and make it more difficult for experts to obtain visibility in the media. Further, the experts themselves could have conflicts of interests that, if exposed, could damage the credibility of their occupational community as a whole. The purpose of this section is to review the literature that addresses these issues, that appears relevant because credibility is a function of both expertise *and* trustworthiness. To the extent that opinion makers are believed not to express their real opinion on a specific problem, social psychologists would remind us, their messages will be discounted and will lose credibility.

More in detail, the *political economy of mass media* perspective (e.g., Bagdikian, 2000; Danielian, 1939; Golding & Murdock, 2000; Klingender & Legg, 1937; Mattelart, 1979; McChesney, 1999; Mosco, 1996; Schiller, 1969; Sinclair, 1920) has been especially concerned over the possible threats to media “objectivity” deriving from economic power and media ownership. Murdock (2001) suggests that these preoccupations originated almost from the beginning of the modern press at the end of

the nineteenth century. "The emergence of a press system funded primarily by advertising whose ownership was increasingly concentrated in fewer and fewer hands ... raised the possibility that press proprietors might use the titles they owned to promote their own political enthusiasms or business interests while denying space to opponents and critics ... [moreover] dependence on advertising revenue opened newspapers to editorial pressure from large advertisers wishing to promote their activities or censor unfavourable publicity" (Murdock, 2001). While political economists of the media tend to emphasize concentration of ownership more than advertising and public relations pressures, in this section I will neglect the former and concentrate on the latter. Opinions regarding a corporation that are expressed in the context of a media belonging to that corporation will arguably be discounted by readers; risks of bias coming from advertiser and public relations, on the other hands, are less easily detectable by the public and thus deserve more attention.

As far as *advertising* is concerned, media organizations derive their revenue from two different markets: a consumer market for media products, and an advertising market, in which access to an audience is sold to advertisers. This means that, to the extent that they depend on the advertising market, "[m]edia organizations use news and other programming as a commodity to attract an audience which they can then sell to advertisers" (Gamson, Croteau, Hoynes & Sasson, 1992). Practitioners tend to believe that the higher a medium's reliance on advertising, the less independent its content will be from the interests of the advertisers, so that "in the extreme case of totally advertising-financed publications ... the content is hard to distinguish from commercial propaganda or public relations" (McQuail, 1994: 159).

Richards & Murphy (1996) reports an abundant anecdotal evidence on pressures from advertisers that resulted in changes in media content (see Tables 1.2 and 1.3). They suggest that "[t]here is little question that a great deal of pressure is being placed on media managers to modify (or eliminate) programming and editorial content that advertisers find objectionable". Moreover, even when no explicit pressures are exerted, media organization may engage a sort of self-censorship, i.e., the media may avoid certain issues or provide visibility to specific topics in order to please advertisers. This

as been termed a “chilling effect” (Baker, 1994). Although “[q]uantification of partisan media bias is quite difficult” (Sutter, 2002), some evidence also exists that, to a certain extent, supports these claims. Milkie (2000) interviewed a small sample of lifestyle magazine editors, and found that they feel compelled to create feature articles and stories that are consistent with advertising content. Soley & Craig (1992) reports the results of a survey of 147 US daily newspapers, according to which more than 90% of editors have been pressured by advertisers and more than one-third of them claimed advertisers had succeeded in influencing news at their papers. On the other hand, other surveys shows that advertisers are almost never a barrier to reporting in the case of New England environmental reporters (Sachsman, Simon & Myer Valenti, 2002). Another study content-analyzed over a period of 25 years almost 100 magazines found that magazines relying heavily on cigarette advertising were far less likely than others to publish stories about the health risks associated with smoking (Lipman, 1992). Overall, it seems that television networks and magazines are more prone to advertiser pressures than newspapers (Richard & Murphy, 1996; Goerne, 1992), and that lifestyle magazines are especially susceptible (Henry, 1979). Another factor that may explain the differences in these findings is the relative weight of public interest vs. leisure orientation among journalists (Van Zoonen, 1998): where the latter prevails (e.g., lifestyle, fashion, sport, travel journalism) professional norms could be more relaxed with respect to relationships with advertisers.

Why would advertisers exert pressures on the media? In line of principle, three different kind of reason are possible:

1. *Avoiding being associated to controversial contents* – For example, anecdotal evidence suggest that advertisers sometimes avoid television shows dealing with issues as abortion and homosexuality, and use outside companies to pre-screen advance tapes of programs in which their commercials are scheduled to appear (Richards & Murphy, 1996). Symmetrically, Gamson, Croteau, Hoynes & Sasson (1992) observe that advertiser influence may result in news likely to attract the attention of high-purchasing power consumers and whose content is likely to create a “buying mood”.

2. *Avoid negative depictions of the company and/or its products* – Such depictions, in fact, result in negative publicity, that may have a rather negative impact on brand and company image and revenue. Coming from a not-interested source, in fact, publicity is considered a rather credible source of information (Bond & Kirshenbaum, 1988) and, moreover, negative as opposed to positive information tends to get more attention (Fiske, 1980).
3. *“Stimulate” positive depiction of the company and its products* – While the latter reason is somewhat “reactive”, this is a more “proactive” strategy. Public relations practitioners have traditionally suggested that publicity is more effective than advertising and other forms of promotions. The idea that news is superior to advertising is expressed throughout the communication literature (e.g., Hallahan, 1996; Schudson, 1984) and supported by a limited empirical literature suggesting that news leads to enhanced learning and recall (Cameron, 1994), greater believability (Schwarz, Kumpf & Bussman, 1986), more positive attitudes (Salmon, Reid, Pokrywczski & Willet, 1985, Straughan, Bleske & Zhao, 1994) and higher behavioral intent (Schwarz, Kumpf & Bussman, 1986, Straughan, Bleske & Zhao, 1994).

With respect to *public relations*, political economy of the media scholars have long suggested that corporate and state sources have massive institutional, legal, and economic resource advantages that support their PR operations. They may as a consequence restrict or enable media access to information, censor news reporting, and threaten journalists with legal redress or loss of access to important sources (Miller, 1994; Philo, 1995; Manning, 2001). Thus, resource-rich organizations may overwhelm journalists with information flows, while information-poor organizations become marginalized. In contrast, sociologists of news sources (Schlesinger, 1990; see par. 1.4.1) suggests that non-official sources may become able to influence the media because, to a certain extent, in public relations labor may substitute capitals. Advocacy groups, social movements, non profit organizations, hence, have access to networks of volunteers or other motivated people that may become increasingly proficient in contacting the media, write press releases, and constructing media events. The critical

position of political economists of the media thus coexist with “pluralist optimism” (Davis, 2003).

Several factors explain the rise of professional public relations. In many countries, the editorial resources of media organizations have declined because of increased competition and cuts in labor costs. Thus, journalists have been forced to increase outputs without a corresponding increase in resources (Davis, 2000). As a consequence, journalists are increasingly dependent from “media subsidies” (Gandy, 1982). In other words, sources that provide information easily transferable into a news story (e.g., well-written press releases, pictures, videos) are much more likely to be chosen. Besides providing information subsidies, professional public relation practitioners, tend to be easier to deal with by journalists: they are easier to contact than other sources; they know the working routines of journalists. The difficulties in the communication process between scientific sources and journalists (par. 1.4.1) are clearly overcome with the intervention of these professionals. The profession has however darker sides that are seldom discussed within the public relations literature. For elite sources, gaining access is not an issue: the function of public relations in this case is to manage and, in some cases, to restrict access (Davis, 2003; see Forde, 2000 for the case of UK pop music journalists). In the case of business sources, public relations have been found to be very successful in restricting mainstream journalist access and reduce the visibility and impact of negative stories (Tiffen, 1989; Ericson *et al.*, 1989). In other cases, public relations work invisibly, (Davis, 2002). Several strategies are possible: seeding negative stories by starting rumors about rival groups or organizations; using *ad hoc* opinion polls to foster favorable views of public interests; and, of more interest here, the use of supposed neutral third parties (e.g., scientists).

**Table 1.3 –US examples of advertiser influence over media content (Television)**

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In 1973, CBS re-ran an episode of "Maude", in which the leading character obtained an abortion. No national sponsors purchased ad time, and approximately 39 BCS affiliates even refused to run the episode (Hoffman, 1992)

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When "Jesus of Nazareth" was broadcast by NBC in 1977, General Motors withdrew its ads after fundamentalist religious groups – (that had not even seen the program – protested (Rosemberg, 1987)

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ABC series "Soap", which ran from 1977 to 1981, lost US\$ 3 million per year because advertisers refused to sponsor it. "Soap" was subject to pickets, threatened boycotts, and a letter-writing campaign, mostly inspired by several religious organizations upset at early reports of sexual content in the series

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McDonald's restaurant chain sent a memo to its franchise holders advising them to keep ad spots out of ABC's mini-series, "The Thorn Birds", in 1983. The series dealt with a Catholic priest involved in a love affair he had known from childhood

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The ABC mini-series "Amerika", in 1987, depicted an America ruled by the Kremlin. It was subjected to heavy criticism by many special-interest groups. Chrysler Corporation, while denying it was motivated by such criticisms, withdrew US\$ 5 million worth of advertising from the show

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In 1989, ABC's "Thirtysomething" lost over US\$1 million when an episode depicted two gay men in bed together, and lost another US\$ 500,000 when the gay couple appeared in a later episode

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ABC's "Geraldo" talk show, which frequently dealt with controversial issues, also met with advertising losses

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Mennen Company withdrew advertising from ABC's "Heartbeat" medical drama because the show included a lesbian nurse

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IBM, Acura, Anheuser-Busch, Toyota, Sharp Electronics, and Spalding all decided to withdraw or reduce their advertising commitments to ABC and/or ESPN telecasts of the 1990 PGA Championship golf tournament when the founder of an Alabama country club announced that his club would not be pressured into admitting blacks

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Some years ago Domino's Pizza Inc. pulled advertising from NBC's "Saturday Night Live" because of its allegedly "offensive" skits. More recently, Mazda did the same for ostensibly the same reasons. Raiston Purina backed out of the same show because in one skit the word "penis" was mentioned several times

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A made-for-TV movie about a Chicago lawyer who dies of AIDS, "An early frost", cost NBC US\$ 600,000 worth of advertising revenue when it first ran in 1985, even though it garnered respectable ratings, and lost another US\$ 1 million when it was rerun about six months later

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NBC's "Quantum Leap", a show that has won many awards, also faced advertiser withdrawals amounting to US\$ 500,000 when an episode dealt with homosexuality in a military school

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NBC incurred a similar loss when it aired an episode of "Lifestories" that discussed a gay television reporter and his battle against AIDS

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NBC also lost advertisers when it ran a movie about the controversial "Roe v. Wade" Supreme Court decision on abortion

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CBS, too, has lost advertisers as the result of "controversial" programming. For example, advertisers have pulled out of two of the network's most popular series: "Murphy Brown" and "Northern Exposure"

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An episode of "China Beach" that dealt with abortion also experienced advertiser pull-outs, and was not rerun

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Robert Iger, president of ABC Entertainment, claimed that research showed that ABC lost US\$ 14 million in the 1989-90 season, US\$ 9 million of which was attributable to controversial programming. He claimed that ABC lost over US\$ 1 million in one movie about Rock Hudson that dealt with his homosexuality

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In 1994, "NYPD Blue" won more Emmy nominations than any series in history, won both People's Choice and Golden Globe awards, and consistently ranked in the "top 20" shows on television. But, because of controversy surrounding the show's occasional depictions of nude rear-ends and use of salty language, ABC was unable to attract major advertisers and consequently lost money on the show

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Source: Adapted from Richards & Murphy (1996).

**Table 1.4 – US examples of advertiser influence over media content (Print media)**

Some years ago, R.H. Macy & Co, one of <i>The New York Times</i> ' three biggest advertisers, told the <i>Times</i> to remove a reporter from Macy's beat after the reporter published a book critical of the retailer
The <i>Seattle Times</i> experienced a sharp reduction in advertising for Nordstrom stores after it published a number of articles about the retailers' labor problems
<i>Ms.</i> Magazine closed for failure to attract sufficient advertising. Advertisers were concerned about appearing in a magazine that took a strong stand on issues like abortion and sexual preferences
After a bad review of "Patriot Games" appeared in <i>Daily Variety</i> , and a series of articles questioning exploitative marketing for "Juice" ran in the <i>Hollywood Reporter</i> , Paramount Pictures decided not to place its traditional congratulatory ads for "Patriot Games" in those publications
The <i>Arkansas Democrat</i> was chided for telling a columnist not to criticize advertisers. John Robert Star, managing director of the paper, declared, "Our policy is no different from every other paper I know about: People hired as columnist by the paper don't trash advertisers"
<i>Omni</i> magazine lost two of its top editors in 1990. They quit because the magazine's management acquiesced to the desires of an advertiser and ran an ad on the front cover of the publication
In 1993, Mercedes-Benz of North America warned 30 magazines not to print its ads in any issue containing an article that portrayed Germany or Mercedes-Benz in a negative light
In the late 1980s, Reverend Donald Wildmon's American Family Association began a campaign against <i>Playboy</i> magazine – because of what Wildmon felt was obscene content – encouraging a boycott and letter writing campaign targeted at the magazine's advertisers. Chrysler received hundreds of letters, and subsequently pulled its ads from <i>Playboy</i>
In the early 1980s, a major advertiser insisted that a press release concerning its financial problems be published exactly as written in the <i>Trenton Times</i> . A reporter who re-wrote the release was subsequently fired
Several years ago the <i>Atlanta Journal</i> published a story about Eastern Airline's baggage handling system at the Atlanta airport. The paper lost an estimated US\$ 100,000 in advertising by Eastern as a result
In the mid-1980s the <i>Wall Street Journal</i> ran some stories about Mobil Oil Company and its executives. The company stopped advertising in the <i>Journal</i> , even though it had run US\$ 500,000 worth of ads in the paper the prior year
The <i>Umpqua Weekly Examiner</i> , in Oregon, was forced out of business after running a series of stories critical of the timber industry and others. The publisher blamed ad withdrawals, resulting from the efforts of Douglas Timber Operators urging advertisers to pull their ads dollars from the paper
WDFL-Channel 32 general manager Stacey Marks-Bronner was the subject of a critical article that appeared in the <i>Chicago Tribune</i> in 1994. The station pulled US\$ 42,000 worth of ads in protest
In 1992, the Duluth, Minnesota, <i>News-Tribune</i> published a column that advised readers how to sell their home without using a real estate agent. As a result, the paper lost nearly half of its real estate agency advertising
More than 40 automobile dealers cancelled their ads in the <i>San Jose Mercury News</i> when an article titled "A car buyer's guide to sanity" appeared in the paper. The dealers objected to the tone of the article, which they felt implied car sellers should be considered unethical adversaries in the negotiation process
When the Hartford <i>Courant</i> newspaper ran an article that urged "buyer wariness" of car dealers, local dealers began an advertising boycott
When the Ogden, Utah, <i>Evening Standard</i> ran a full-page story that featured an auto dealer in another city, dealers in the Ogden area were outraged and withdrew their advertising
In December 1985, the Federal Trade Commission charged 105 automobile dealers, including some in the Detroit area, with antitrust violations. When the <i>Detroit Free Press</i> reported the story, several local dealers cancelled their ads

Source: Adapted from Richards & Murphy (1996).

### 1.5 – Opinion Maker: A definition

Expertise is a very broad and fragmented subject of scholarly enquiry, since it spans several disciplines and bodies of knowledge that have seldom looked at each other. The review conducted in the previous paragraphs has attempted to map the field and identify key contributions. Of course, in doing so, selection was an issue: I neglected certain aspect of expertise to provide prominence to others. In particular, my purpose was to identify and define the general characteristics of the specialized workers that, by virtue of their access to media, may be defined opinion makers. More in detail:

1. *Opinion makers are credible and persuasive sources of information.* Source credibility is a powerful mechanism of persuasion and social influence, since it leads to interiorization of messages. Moreover, *opinion makers are credible because of both their expertise and trustworthiness.* As regards the former, external credentials (e.g., institutional positions, accreditation by third parties) are normally employed as a proxy for expertise by both media organizations and their audiences. As regards the latter, it is linked to their supposed neutrality and lack of self-serving interests over the positions they maintain. Perceived conflicts of interest and the maintaining of ideological positions may decrease the perceived credibility of opinion makers.
2. *Opinion makers are employed by the media as specialized sources of information.* Thanks to the media, experts become able to influence audiences much broader than their immediate social network. Three main typologies of opinion makers may be identified: experts occasionally employed as media sources (e.g., scientists); experts that regularly cooperate with the media (e.g., movie critics); specialized journalists (e.g., science or sport reporters). The boundaries that separate these categories are sometimes rather blurred. Thus, expert sources may become the media intellectuals despised by Bourdieu (1997) and asked to write a regular advice column in a newspaper or magazine. Further, it is sometimes hard to distinguished between “regular” experts and specialized journalists: while experts typically have other occupations and consider their involvement with the media as an accessory activity, in some cases the opposite may be true.



3. *For every area of expertise, hierarchies of opinion makers emerge.* Within occupational communities, not all experts are equals. Hierarchies of reputation are based on expertise, credentials, and/or employer reputation. Thus, a Nobel laureate in economics will be more reputed than other economics professors; a fashion journalist working for Vogue will be considered higher in ranking than most colleagues. When looking for experts to interview, journalists will typically employ sources at the top of their occupational hierarchies. It must however be stressed that less reputed experts may achieve a high level of media visibility and, over time, be asked to comment over issues beyond their area of specialization. In other words, occupational and media hierarchies do not necessarily coincide.
4. *Opinion makers influence their audiences.* Media framing and agenda setting theories predict that journalists and experts influence public opinion and highlight certain aspects of reality while neglecting others. In other words, opinion makers participate in the social construction of reality. Moreover, they may affect business organizations: by theorizing legitimate behaviors and structures, and by providing visibility to, and evaluating the quality of their products and services.
5. That said, *there are limits to the influence of opinion makers over audiences.* Expert sources compete to with other sources (e.g., public officials, advocacy groups, etc.) to gain media attention and to diffuse their preferred frames. More broadly, what appears in the media has limited effect over audiences. Both media scholars and sociologists of diffusion suggest that patterns of social influence may contrast or reinforce opinion maker influence.

## Appendix 1.1 – Experts and policy making

Policy makers often require expert inputs. Most of the research regarding the relationship between policy making and expertise is focused on *scientific* expertise; since scientists are usually, because of their institutional positions (i.e., within universities and research centers), at the top of their respective hierarchies of expertise, this is by no means surprising. In policy making context, “scientific experts are expected to use their skills and knowledge as a means of producing arguments and insights for identifying, selecting, and evaluating different courses of collective actions” (Renn, 2001). More in detail, scientific expertise may assist policy-makers to meet five major functions (Renn, 2001; 1995):

- *An enlightenment function* – It consists in providing factual insights that help policy makers to identify and frame problems and to understand the situation. Scientific experts, in this context, provide the knowledge needed in order to ground environmental, economic or social policies in factual knowledge, and to assess the success or failure of policies.
- *A pragmatic (or instrumental) function* – It consists in providing instrumental knowledge that allows policy makers to assess and evaluate the likely consequences of each policy option. Scientific methods and results are employed in order to make “if-then” statements that can help problem solving activities.
- *A reflexive function* – It consists in providing arguments, associations, and contextual knowledge that helps policy makers to reflect on their situation and to improve and sharpen their judgment. This means that science may help policy maker to reflect about their activities, and to consider social, cultural, institutional, and psychological limits and opportunities not easily grasped by common sense.
- *A catalytic function* – It consists in providing procedural knowledge that helps policy makers to design and implement procedures for conflict resolution and rational decision making. Scientific expertise may be employed to design procedures of policy formulation and decision making that, although not interfering with the preferences of those involved, may permit to let these preferences emerge. Scientists have then to act as a chemical catalyst, i.e.

speeding up (or slowing down, if it is the case) the process of consensus building among the interested parties.

- A *communication function* – It consists in providing guidelines or designing policy options that assist decision makers in their effort to communicate with the relevant stakeholders and audiences. A main purpose of such assistance is that of legitimizing public policy.

Of course, scientific expertise contribution to policy formulation and implementation may not be exaggerated. Scientific experts are useful only to the extent that their domain-specific knowledge may provide guidance that is both reliable and relevant to the policy options considered: this is not always the case, however, and policy makers sometimes have utopian views of science (Funtowicz & Ravetz, 1990; Jasanoff, 1990, 1991; Rip, 1992; Beck, 1992). For example, policy makers may be more confident about knowing the future than is justified (illusion of certainty) or overconfident in generalizing results from one context to the other (illusion of ubiquitous applicability). Renn (2001) observes that these illusions are often reinforced by the experts themselves: “[m]any experts feel honored to be asked by powerful agents of society for advice [and may] fall prey to the temptation to oversell their expertise and provide recommendations far beyond their realm of knowledge”. A second problem with the use of scientific expertise derives from the fact that policies often require experiential and local knowledge: scientific knowledge, alone, may not be sufficient. For example, when planning highways or promoting health care for a community, “abstract” knowledge must be complemented by knowledge of the social context and the specific history of the issue within this context (Wynne, 1992; Jasanoff, 1990).

Scientific expertise is absorbed and employed by policy systems in different ways, on the basis of cultural differences among nations and historical developments (Solingen, 1993). Policy scholars have identified different approaches to integrating expert knowledge into public decisions (Brickman *et al.*, 1985; Jasanoff, 1986; O’Riordan & Wynne, 1987). Renn (1995) distinguishes four styles.

- The *adversarial style* is characterized by an open forum in which different actors compete for social/political influence in policy making. Scientific evidence is

employed by all interested actors to support their positions; as discussed in the previous chapter, the media are a central arena for influencing public opinion and mobilize resources in support. Scientific evidence coming from all sides is taken into consideration by policy makers, since policy decisions may be challenged in case of insufficient use or neglect of scientific knowledge. Advisory boards composed of scientific experts are employed by policy makers in order to evaluate competing claims of evidence and, eventually, justify the final policy selection (Jasanoff, 1990). The US system is oriented towards the adversarial style.

- The *fiduciary style* is characterized by trust towards policy maker, who are believed to act for the “common good”; public scrutiny of the policy making process is not part of this approach. Of course, the public can offer information or arguments, but is not involved in the policy formulation process. Scientists are employed when the need arise, on an *ad hoc* basis, and are chosen on the basis of prestige or personal affiliation. Most southern European countries display a fiduciary approach.
- The *consensual style* is based “on a closed circle of influential actors who negotiate behind closed doors” (Renn, 2001). Representatives of social parties and scientists work together to reach predefined objectives. Through negotiation, the best available evidence is combined with the various interests represented by the social actors involved in the policy making process; controversy is not made public, and conflicts are often reconciled before formal negotiations take place. The Japanese system tends towards the consensual style.
- The *corporatist style* is similar to the consensual approach, but is more formalized. High-status experts are invited to join a group of carefully selected policy makers representing major forces in society (e.g., employers, unions, professional associations, environmental groups), and asked to provide their professional judgments. This approach is based on trust in the expertise of scientists, who often do not need to present formal evidence for their claims. The policy style of northern European countries is oriented towards a corporatist approach.

To recap, the complexities of post-modern, globalized and pluralistic societies of most nations have stimulated an increased use of scientific expert advice and guidance over policy formulation and implementation. Although culture-specific arrangements exist, the basic idea to this respect is that scientists may be employed to provide expert and trustworthy knowledge over issues of interest. A final concern in this brief review regards the problem of neutrality. In what has been ironically termed as a “civics textbook” view of the role of science in policy making, “scientists are supposed to be neutral seekers of the truth” (Sabatier & Zafonte, 2001), and to present relevant knowledge to policy makers. However, scientists are seldom “neutral”: besides divergences and disputes within and across disciplines, the relationship between neutrality and practical relevance of scientific knowledge is to be questioned here. Many social scientists are usually involved in basic, rather than applied, research, i.e. in “knowledge for knowledge’s sake” and to advance the discipline, rather than to apply it to a specific policy problem. Neutral and “apolitical” scientists are unlikely to produce the results, accumulated over extended periods of time, which are necessary to have an effect on policy (Weiss, 1977). “Thus, the most active scientists in a particular dispute are likely to be those who have been involved the longest and who are most committed to defending a particular point of view” (Sabatier & Zafonte, 2001). As a result, the scientists that can contribute the most to important policy disputes are hardly neutral (Mazur, 1981).

## *Appendix 1.2 – Expert witness in legal systems*

Expert testimony has been a feature of legal systems since at least the thirteenth century, when in England special juries of experts were established to hear or investigate matters related to their trades, and individual experts were employed by judges in areas where their expertise was required (Landsman, 1995). Nowadays, expert witnesses are still employed by judges or juries as provider of technical information instrumental in educate them over issues that go beyond an average person knowledge. For example, “an expert might discuss methods or materials for building bridges that laypersons or nonprofessionals might not normally understand, such as principles of engineering or the stress that particular alloys can withstand” (Heard & Faust, 2001). Similarly, psychiatric testimony may be employed to assess whether a person may be released from penal responsibility because of mental disease.

Functions and procedures to employ expert testimony are different in civil law and common law systems (Kovera, 2001). In *civil law systems*, experts are usually appointed by the judge presiding a case when the issues to be resolved are beyond the understanding of the court; this has stimulated the development of specialized forensic laboratories. The laws regarding expert testimony in these systems focus on the procedures to be used to appoint an expert, the definition of the scope of the expert’s duties, and whether the expert’s testimony or opinion is binding upon the presiding judge. For example, in France courts maintain lists of experts that meet certain qualifications, although judges may also employ experts who are not on the list; the findings of experts are not binding upon the judge; and expert findings are presented to the court in a written report rather than in oral testimony (Bastuck & Gopfert, 1994; Lee, 1997; Taylor, 1996). In *common law systems*, although judges may appoint their own experts, this prerogative is rarely exercised (Gross, 1991). Experts are instead usually proffered by one or both parties of a legal proceeding, and the judge then decides whether the proffered expert testimony will be admitted into evidence. Of course, each national system has its own peculiarities, but comparative analyses show the existence of important similarities among common law system countries (e.g., Gatowski *et al.*, 1996).

In many common law systems, and especially in the United States, public confidence on the adversarial system has been limited by some “highly publicized instances of expertise gone awry” (Jasanoff, 2001), as in the case of the so-called recovery memory and child abuse cases (Hacking, 1995)<sup>14</sup>. If here we have a case of subjective opinions believed as science, in other cases critics have highlighted the fact that in many cases of product liability lawsuits, jury verdicts favorable to plaintiffs contrasted with respected scientists’ opinions, which denied the existence of any causal connection between the alleged harmful agent (e.g., a drug) and the harm suffered<sup>15</sup>. The discontent about the misuse of science in judgments led the US Supreme Court to address the issue in 1993, where the so-called *Daubert* criteria were issued. Very briefly, the Court urged judges to screen scientific results in pretrial proceedings, according to the following criteria: (i) was the evidence based on a testable theory or technique, and had it been tested; (ii) had it been peer reviewed; (iii) did it have a known error rate; (iv) was the underlying science generally accepted. In civil law systems, the fact that experts are court-appointed precluded much controversy about the legitimacy of experts and the quality of their testimony (Jasanoff, 2001).

Starting from the 1980s, empirical research exists examining the effects of expert testimony has become relatively common. Most of this research has however focused on the impact of expert testimony on the collective judgments of juries; empirical research on how judges evaluate expert witness claims is instead much more limited (Kovera, 2001). As far as research focusing on juries is concerned, from the methodological point of view scholars have typically employed experimental designs in

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<sup>14</sup> In a significant number of cases, psychiatric experts testified to support the reliability of recovered childhood memories; subsequently, however, some witnesses recanted and it became evident that some experts had instilled, rather than elicited, such memories. As a consequence, the profession denied the scientific validity of the claims and repudiated the expertise of the claimants (Loftus & Ketcham, 1994).

<sup>15</sup> Jasanoff (2001) reports two noteworthy cases. One was the litigation involving Bendectin, a medication prescribed to pregnant women for morning sickness and subsequently suspected of causing birth defects in their children. Juries frequently awarded damages despite assertions by epidemiologists that there was no statistically significant evidence linking Bendectin to the claimed injuries (Sanders, 1998). Another noteworthy case is the litigation involving silicone gel breast implants. Almost half-million women surgically implanted with these medical devices sued the manufacturer, Dow Corning, claiming various injuries (from minor discomforts to permanent immune system damage). Also in this case, epidemiological studies, started only after the wave of legal actions (whose results were subsequently published in the high-ranking *New England Journal of Medicine*) showed no causal connection between the implants and immune system disorders (Angell, 1996).

the context of trial simulations in order to examine the effects of expert testimony on judgments. In these simulations, mock jurors (e.g., college undergraduates, members of the community) were presented with written, audiotaped, or videotaped trial stimuli, that vary the presence/absence of expert testimony or some characteristics of expert testimony (Kovera, 2001). Most of this research has been conducted in the context of common law systems, and has examined whether the testimony of an expert called by one of the parties (i.e., an adversarial expert) affected juror or jury decisions. For example, it was found that in presence of expert testimony presented (only) by the defense, jurors are more likely to return defense verdicts (e.g., Schuller & Cripps, 1998); symmetrically, in the case of expert testimony presented only by the prosecution, jurors are more likely to convict the defendant (e.g., Brekke & Borgida, 1988).

Variables that moderate the impact of expert testimony on juries' judgments have also been investigated. For example, expert testimony has greater influence (i) when it appears earlier rather than later in the trial (Brekke & Borgida, 1988; Schuller & Cripps, 1998); (ii) if the expert explicitly links the scientific research to the facts of the case under consideration (Brekke & Borgida, 1988; Schuller, 1992). Overall, these studies have implied that it is desirable that experts influence juries; some researchers have instead explicitly considered whether the use of expert witness may improve the quality of decisions. This is the case, for example, of Cutler *et al.* (1989), who manipulated factors affecting the reliability of eye-witness identification and the presence of expert testimony describing factors influencing the accuracy of identifications. After hearing expert testimony on the topic, jurors become sensitive to factors known to decrease the reliability of eye-witness identifications, and employed the information for their decision making.

Another line of research has compared adversarial expert testimony with that provided by court-appointed experts. On this, an important research finding is that court-appointed experts' claims are evaluated in a less critical and attentive way than in the case of adversarial experts. For example, one study found that non-adversarial expert testimony on the factors affecting the reliability of eyewitness identifications caused jurors to become skeptical of the reliability of all eyewitness identification rather



than just those identifications made under unreliable conditions (Cutler *et al.*, 1990). Another study found that jurors seem to remember evidence presented by the adversarial expert better than they remembered evidence presented by the court-appointed expert (Brekke *et al.*, 1991). Definitely, the status of an expert (i.e., adversarial vs. court-appointed) seems to influence how his/her claims are cognitively processed.

Finally, researchers have investigated whether judges or juries are able to evaluate the quality of expert claims. Kovera & McAuliff (2000) asked judges to evaluate the admissibility of expert testimony that varied in its scientific validity; the stimulus consisted in the description of a psychological experiments that was either flawed or valid (e.g., absence/presence of a control group); they however found that methodological soundness considerations did not affect judges' decision to admit the expert evidence at trial. Similar results were obtained in the context of trial simulation studies (Kovera *et al.*, 1999), where it was found that jurors' judgments were unaffected by variations in methodological quality. Clearly enough, judges and juries are not scientists.



## **2. Sector-specific literature: Opinion makers that influence markets**

Besides specialized journalists (par. 1.4.2), many typologies of opinion makers exists, and not surprisingly, scholars that analyzed specific areas of social life could not avoid finding evidence of their existence and important role. Most of the related literature, however, has mostly adopted a “watertight compartment” approach, i.e. a focus on the specific typology of expert deemed of interest without considering the literature developed in other fields of inquiry. When conducting a comparative review, however, it is easy to note that although idiosyncratic differences exist, in most cases there are striking similarities in the research questions that have been investigated. The purpose of the present chapter is to discuss such “sector-specific” literatures and their main research findings, in order to highlight these similarities to better understand opinion makers.

The experts here analyzed are arts and literary critics; security analysts; medical experts; and the so-called “management gurus”. As shown in Table 2.1, the same typologies of experts have been typically analyzed by more disciplines, each of which informed by own theoretical interests and practical implications. In the paragraphs that follow, each of these opinion makers will be analyzed and, when feasible, the contribution of each stream of research to their overall comprehension will be discussed. The point of arrival of the present chapter is a comparative analysis of the research questions that have been investigated across literatures, which shows that a certain level of convergence exist over certain themes, most notably: (i) the impact opinion makers have over organizations and audiences; (ii) an interest for the determinants of their attention over products (which is a scarce resource) and the favorableness of their judgments; (iii) the fact that hierarchies of expertise and credibility tends to emerge within their occupational communities; (iv) the potential for conflict of interests. These converging themes will be employed in chapter three to contrast the marketing literature on the issue of opinion makers as specialized sources of information over products and services.

**Table 2.1 – Opinion makers and sector-specific literature of interest**

<b>Typology of Opinion Maker</b>	<b>Literature of interest</b>
Arts and literature critics	Sociology of the arts and literature Cultural Economics
Security analysts	Finance and Financial Accounting Sociology of Organizations / Organization Studies
Medical experts	Sociology of Medicine Pharmaceutical industry literature Medical literature (conflict of interest issues) Sociology of science
Management gurus	Management and Organization Studies

### *2.1 – Critics in arts and literature*

Critics apply aesthetic systems to the evaluations of specific cultural products (Becker, 1982), legitimizing them as works of art. Hence, together with other actors (e.g., publishers, gallery owners, film producers), critics may be considered as “cultural gatekeepers”, in the sense that they “determine which products cross the boundary between the private and the public domains” (Verdaasdonk, 2001). Professional critics’ “power to consecrate” and to “give value” (Bourdieu, 1986) comes as a consequence of their specialized training, acquired expertise, artistic and aesthetic knowledge. In the modern meaning of the term, the diffusion of critical reviews on cultural objects (e.g., art exhibitions, theatrical plays, etc.) has gone hand in hand with that of newspapers during the XVIII century (Poli, 2002; Kamerman & Martorella, 1983) and subsequent emergence of specialized arts outlets. Nowadays, criticism is an essential part of the institutional context of contemporary cultural fields. Empirical research in arts and culture criticisms has been conducted by both cultural economists and empirical sociologists of the arts and culture. While the former are most of the time preoccupied with the impact of reviewers on the relative success of works of arts (a preoccupation shared by marketing scholars), the latter have investigated the division of work among

member of the institution of criticism, the working of the evaluative function of criticism, and the determinants of critical attention to cultural products.

Typical reviews are composed of distinct components, and include *descriptive* elements, consisting in information about the cultural product; *analytic* elements, providing an interpretive context for understanding its aesthetic significance; and *evaluative* elements, consisting in positive or negative judgments. Criticism operates by a threefold selection and classification process that subsequently involves news media, literary magazines, and academic journals, and that is based on gradually reaching agreement on authors' literary value; this was studied by sociologists especially in the case of literary works of art (Van Rees, 1983, 1987; Van Rees & Vermunt, 1994). The final result of this threefold process is that a work of art (or an artist) becomes institutionalized and taught at secondary schools. Empirical research seems to suggest that reviewers writing for the news media, at least in the case of literature, act as a sort of filter for authors, in the sense that members of the institution of criticism operating in downstream phases (i.e., essayist and academic literary critics) seem to "reproduce" the initial judgments of the former, and concern themselves almost exclusively with work by authors who have received positive attention from journalism criticism (Van Rees, 1983; Rosengren, 1987; Verdaasdonk, 1995).

Traditionally, critics have been credited with the ability to identify the *intrinsic* characteristics of cultural objects that make them works of art. The expertise of critics, according to this view, "is believed to consist essentially in the ability to identify those intrinsic characteristics that induce the judgment that we are dealing with works of art" (Verdaasdonk, 2001). More recently, however, researchers have come to view that value judgments about artistic quality are not logical statements that can be shown to be either true or false. In assigning quality, hence, "critics *lack* an instrument to measure a work's quality in an intersubjective and reliable way" (Van Rees & Vermunt, 1996), but are nevertheless able to perform their threefold task of describing, interpreting and evaluating these works. In doing so, they resort to their own *conception of art*, i.e., a normative view (which is sometimes rather implicit and not systematized) on the nature and function of art (Bourdieu, 1983; Weitz, 1966; Ellis, 1974; Radford & Minogue,

1981; Van Rees, 1983; 1987). Moreover, several different conceptions of art may coexist. Hence, unlike other kinds of experts, cultural critics cannot refer to "objective" truth, but have to rely on socially constructed (and evolving) normative views on arts.

The explanation for the fact that, over time, a consensus among different critics is reached about the artistic value of a given cultural product does not depend upon its intrinsic properties, but rather upon the fact that "critics take due note of each other's achievements and are very considerate of the statements of their colleagues" (Janssen, 1997). This view is empirically supported by several studies into the critical reception of certain texts or bodies of works, from which it appears that critics and reviewers fall back into previous statements by critics and the authors in question, and incorporate these statements in their own reviews (Bel, 1993; Van Dijk, 1994; Janssen, 1994; Van Rees, 1987; Ritchie, 1988; Rodden, 1989). For example, sociologists of literature have brought to light examples of reviews in which literary critics changed their mind about a writer to a judgment more consistent with general opinion (Van Rees, 1987); in one extreme case, a critic published a favorable review on the work of an author that he admitted to dislike in a private letter (Van Dijk, 1990).

This phenomenon of gradually achieving of consensus has been described as "orchestration" (Bourdieu, 1983; Van Rees, 1987). It does not, however, mean that each critic will align to the common opinion, but that the social and institutional framework will be considered. On this, Bourdieu (1983: 317) suggests that "[e]very critical affirmation contains, on the one hand, a recognition of the value of the work which occasions it, which is thus designated as worthy object of legitimate discourse ... and, on the other hand, an affirmation of its own legitimacy. Every critic declares not only his judgment of the work, but also his claim to the right to talk about it and judge it". By making a statement, then, what is at stake is not only the status of cultural products (and their authors), but also of the critics themselves. The lack of reliable procedures to assess artistic quality means that there will not be "objective" ways to assess the quality of critical work. In this case, then, "[o]nly the similarity or comparability of his statements with those made by other experts provides a clue to whether or not he is

right. This is way critics take due note of the achievements of (reputed) colleagues” (Janssen, 1997).

Of course, this does not mean that in every situation, critics will agree with the common opinion. On the contrary, in order to enhance their prestige as experts, critics have to distinguish them from their colleagues, and “[i]n order to make their name ... critics may choose to systematically disagree with some, or all, of their colleagues” (de Nooy, 1999). The appreciation of a critique strongly depends on whether it is perceived as an original, inventive viewpoint, and so “a critic should try to develop perspectives on literary works which might be taken for a refinement or enrichment of previous critical tenets” (Janssen, 1997). This means that critics have at their disposal both “agreement” and “disagreement” strategies when they want to climb their hierarchy of expertise. There will however be limit to the “originality” a critic may afford herself without risking her reputation: “[r]oughly speaking, a critic’s selection of works for discussion should be the same as the selection made by his colleagues. A critic who repeatedly concerns himself with works not considered to be worthwhile by other critics may arouse doubts about his expertise. The same holds for a critic who omits to deal with works deemed important by his fellow experts” (Janssen, 1997).

Overall, then, the mechanisms previously described seem to constrain a lot the functioning of the institution of criticism. The result of the previously described institutional constraints to critical reviewing practices is that most artists are never reviewed or studied. As previously discussed, critics do not live in a social vacuum, and institutional mechanisms explain the reasons why most of them will review the same cultural objects. This view is empirically supported. For example, Janssen (1997) showed that Dutch literary reviewers’ attention was limited to only 54-36% of fiction titles newly released, respectively, in 1978 and 1991. Moreover, attention seem very concentrated, since in both time periods, a limited number of titles account for most reviews.

## 2.2 – Security analysts and financial markets

Security analysts are professionals who work within the investment banks and brokerage houses' research departments and provide independent and objective advice to investors about the value and merits of equity securities (Morley, 1988), thus permitting them to make more informed investment decisions. In financial markets, they evaluate corporate securities thanks to an expertise that the average investors lacks. All major investment banks / brokerage firms (and many smaller ones) have teams of analysts who research public corporations<sup>1</sup>. Individual analysts are specialized by industry (one or a few ones that are thought to be somehow related) and follow the performance of a limited number of firms. Their activity produces two main outputs: forecasts of followed firms' future earnings and advice that investors buy, sell, or hold their shares in the stocks of these firms (Zuckerman, 1999). These outputs are typically published or distributed, either directly as reports by investment banks and brokerage houses, or indirectly as news, information, gossips, and rumors in newspapers and magazines (Mathur & Waheed, 1995).

While analysts sometimes disagree among themselves, certain currents of opinion, especially when authoritatively supported by the best known analysts that cover a given industry, significantly influence security prices (e.g., Stickel, 1985, 1992). For example, Womack (1996), in a study of 1,500 recommendations over a three-year period, found that a buy recommendation can increase a stock price by 3%, whereas a sell recommendation can reduce it by 4,7%. Further, the simple initiation of coverage by an analyst increases the stock price of firms with small analyst following (Branson, Guffey, and Pagach, 1998). When many analysts cover a firm, it tends to attract investors' attention, enjoys increased market evaluation, and can raise capital at a lower cost (Useem, 1996). Analysts' earning forecasts are even more consequential than their advice to buy, sell or hold securities, since a primary question posed when firm release its earnings is whether it met or not analyst projections.

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<sup>1</sup> In this paragraph, I refer to the so-called "sell-side" security analysts only. Their "buy-side" colleagues, employed by institutional investors and fund managers, have been researched much less, arguably because the results of their activity are not publicly available and, hence, influence financial markets to a lesser extent.



In sum, security analysts are an important feature of financial markets, where they play a role similar to that of critics in arts and cultural fields. It is not surprising that different streams of research have “analyzed the analysts”; among academicians, however, there is not a consensus as to what they actually do or as to how they create value for investors. Existing conceptualizations of security analysts are structured around two rather different strands of literature – neoclassical economics and institutional sociology – that have disparate views on their role and market impact, which are downplayed by the former, and accentuated by the latter, to the extent that security analysts’ cognitive processes and expectations are thought to actually influence firm strategies. Since analyst coverage and favorableness is important to attain for companies, a related literature has investigated their determinants, focusing however on “structural features” of companies that attract attention (e.g., size, profitability) rather than active companies’ behaviors (e.g., investor relations activities). Further, recent financial scandals have highlighted the fact that analysts’ forecasts are optimistically biased and tend to be above actual earnings, and that ‘sell’ advice is very infrequent: since security analysts often review securities issued by companies that are clients of the banks for which they work, allegations of the possibility of a conflict of interest have emerged, and empirical research has started addressing the issue. Finally, a literature that is “transversal” to the streams so far discussed, has instead investigated the emergence of hierarchies of expertise within the profession, with greater influence (and compensation) accruing to those staying at the top of the pyramid.

### *2.2.1. The function of security analysts: Neoclassical and sociological perspectives*

Under a *neoclassical economic approach*, analysts are considered as information processors that can identify the “true” value of a security by processing the latest available information. This approach models analysts as rational decision makers that operate in condition of risk. According to these models (e.g., Savage, 1951), investors’ decision to buy and sell follow their subjective probability estimates about future price and earnings. Actors incorporate new information into their prior beliefs through a mechanism of “updating” similar to Bayesian statistical inference, where *a posteriori*

information influence *a priori* probability distributions. This means that rational investors will become more optimistic about a company's stock price with the arrival of good news, and vice-versa. A corollary of this view is that since all investors are presumed to be rational, they will all interpret the same piece of information in the same way, so that a consensus on the "true" value of a security will be eventually reached by all actors.

This information processing view of calculation underlies the efficient-market hypothesis of neoclassic finance, which is the dominant academic perspective on capital markets. According to the most prominent form of this position, a financial asset's price incorporates all past and future public information and is therefore the best estimate of its value<sup>2</sup>. More in detail, a price represents the future stream of dividends that will flow from a share of stock adjusted by discounts for time (dividends received far in the future are worth less) and risk (high-risk investments must yield higher return since investors must be compensating for taking on that risk). Some investors will "overshoot" their estimates, other will "undershoot" them, but on average these errors will compensate each others. Since markets are thought to be informationally efficient, there will be no mispriced stocks and no investment opportunities (Samuelson, 1965; Fama, 1969).

Under a neoclassical finance perspective, the functions of security analysts is hard to explain. They are information processors, i.e., they search and assemble information. However, since the efficient-market hypothesis states that the stock prices will adjust to all available new information, security analysts' information gathering activity may be considered as redundant and investors will hardly find value in their reports. In other words, under this perspective analysts are expected to perform no worse than the market itself. Economic studies, however, show that analysts are not accurate in their evaluations, and actually perform *worse* than the market. Starting from Cowles' (1933) seminal piece, "Can stock market forecasters forecast?", economists have benchmarked the performance of analysts against a variety of quantitative measures, and found them to be rather inaccurate. Many researchers have found that the

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<sup>2</sup> This represents the "semi-strong" version of the efficient-markets hypothesis (Fama, 1976). The "weak" version of the hypothesis states that prices incorporate only past public information, while the "strong" version states that prices include all public as well as all private information.

stocks recommended by analysts produce returns below those of a random portfolio (e.g., McNichols & O'Brien, 1997; Bidwell, 1977; Logue & Tuttle, 1973; Diefenback, 1972). Other studies have found that analysts' earnings forecast are systematically biased upwards (Degeorge, Patel & Zeckhauser, 1999; Lim, 2000).

In sum, existing economic literature presents analysts as inaccurate forecasters and unprofitable investment advisors. Further, this perspective predicts the disappearance of security analysts (e.g., Fama, 1965). The "anomalous" existence of security analysts is inconsistent with the financial economic perspective, and is explained for example by Jensen & Meckling (1976) by arguing that their direct monitoring of managers helps reduce the agency costs inherent in public corporations. The *sociological perspective* on financial markets consider analysts in a much different way and, similarly to what happens in other cases, the models employed by economists "strike sociologists as unrealistic in their simplicity" (Zuckerman, 2004). The efficient-markets hypothesis, it is argued, is not founded on the study of human decision making, but on an idealized view that facilitated formal modeling. Institutional sociological thinking has tried to shed light on how analysts, faced with uncertainties, try to perform the nearly impossible task to "predict the future" on the basis on available data: under such circumstances, individual decisions are influenced by group norms and values, as individual analysts are subjected to be influenced by the decisions of the colleagues who follow the same securities. A key argument proposed is that faced with uncertainty, security analysts tend to imitate each other: an argument that has striking similarities to that proposed by sociologists of literature to explain how critics reach consensus over the value of a work of art.

The sociological view on security analysts is effectively presented in a recent sequence of contributions that highlight the mechanisms of mutual influence among security analysts. Zuckerman (1999), on the basis of recent advances in finance theory not founded on the "orthodox" view of neoclassical economics, advanced the idea that access to information is insufficient for price to equal its theoretical value, since regardless of its availability, information must be decoded. Cognitive limits on information processing, coupled with the inherent predictability of the economic future,

hinder interpretation and, as a consequence, “interpretation is a social enterprise, carried out with an eye to how others will come to view the same information” (Zuckerman, 1999: 1411-2). This idea is empirically supported by Hayward & Boeker (1998), who found that a focal analyst’ rating of a security is affected by peer mean ratings, i.e., when the ratings of other analysts are higher, the ratings of the focal analyst tend to be higher.

This point is theoretically strengthened by Rao, Greve & Davis (2001), that employ neo-institutional theory to examine the dynamics of social influence in the choices of security analysts to initiate and abandon coverage of listed firms. According to neo-institutionalism, decision makers imitate peers, especially peers perceived to be successful and legitimate, in order to minimize search costs and to avoid the costs of experimentation (DiMaggio & Powell, 1983). These authors highlight the fact that the initial decision to cover a company cannot be based on a careful analysis of available information, since that would require a coverage of that company in the first place. Instead, analysts resort to imitating the coverage decisions of their peers, especially the high-status ones. This mechanism of social proof – using the action of others to infer the value of a course of action – creates information cascades in which analysts initiate coverage of a firm when peers have recently begun coverage. Rao *et al.* (2001) also found that analysts that initiate coverage of a company in the wake of one of such cascades are particularly prone to overestimating the firm’s future profitability, and are subsequently more likely than other analysts to abandon coverage of the firm. In other words, social proof leads to a cycle of imitation, disappointment, and abandonment.

In sum, the sociological literature on analysts adds to our understanding of the role of security analysts and their impact on society. By treating security analysts as critics, the work of institutional sociologists gives analysts a substantial role as information intermediaries: a role that neoclassical theories deny. Further, this perspective takes into consideration the uncertainties that analysts have to face when evaluating securities: it is not always possible to determine the impact that specific event have on securities’ future profitability and risk. In these cases, imitation of those peers that are perceived as more expert may be a resourceful alternative. Clearly, the

sociological literature has introduced social structure in the analysis of financial markets. In a recent contribution (Beunza & Garud, 2004), however, it has been suggested that while the neoclassical economic view is “undersocialized”, the sociological view may instead be “over-socialized” when it proposes that analysts, simply, follow each other. The authors note that neither perspective can explain the value that institutional investors report they derive from analysts’ activity – access to industry knowledge and written reports – nor do they adequately address the difficulties associated with analyses when new firm categories emerge. They propose that security analysts are first and foremost frame-makers, i.e. they provide professional investors with a framework with which they can calculate and, occasionally, such as where new typologies of securities emerge (e.g., Internet companies stocks), they may create new frames that displace prevailing ones. Clearly, no consensus still exists over the functions of security analysts.

### *2.2.2. Security analysts and organizational legitimacy*

It was previously argued that analyst following is consequential for covered companies, since it leads to increased investor attention and more favorable security prices. Institutional sociology contributes to our understanding of security analysts as a source of influence over organizations by suggesting that the very cognitive acts through which they make sense of the differences between securities is consequential for the companies that issue them.

More precisely, Zuckerman (1999) suggests that analyst attention implies an acknowledgement from the part of the analyst that the security is legitimate. Since security analysts specialize by industry type, analyst attention signals a specific kind of legitimacy, i.e., membership in an accepted product category. Securities that fail to attract attention from relevant analysts are hence perceived as less legitimate, and are susceptible to illegitimacy costs<sup>3</sup>. More specifically, it is argued that failure to gain

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<sup>3</sup> This argument draws on neo-institutional theory’s (Meyer & Rowan, 1977; DiMaggio & Powell, 1983) discussion of legitimacy as the generalized perception or assumption that an organization’s actions are “desirable, proper, or appropriate within some socially constructed system of norms, values, beliefs, and definitions” (Suchman, 1995). Accordingly, the need for legitimacy is a powerful force that leads, over time, to isomorphism, i.e., organizations’ structures and behaviour will resemble each other.

attention from analysts that specialize in a security's intended category reflects confusion over the companies' identity and that, all things being equal, this should depress demand for its securities. In other words, according to Zuckerman (1999), under uncertainty a security's value can only be assessed by comparison, and these comparisons can only be performed among sufficiently similar candidates, like those belonging to the same category. Consequently, analysts screen out those companies that do not belong to any existing category. This generates an "illegitimacy discount" for those firms that straddle several categories. The validity of this assertion is tested by the author among public US firms in the stock market over the years 1985-1994. Findings are supportive, since they show that stock prices are discounted to the extent that a firm failed to attract the attention of security analysts specialized in its industries.

This argument is strengthened by the author in a subsequent article (Zuckerman, 2000), where the need to present a coherent product identity in the stock market is proposed as one of the many factors that spurred the de-diversification of the conglomerate companies in the US stock market in the 1980s and 1990s. Because they straddled the industry categories that analysts employ to compare like assets, diversified firms hinder efforts at evaluating their shares. Consequently, managers of such firms faced pressures from analysts to de-diversify so that their stocks could be more easily understood. Illegitimacy costs, hence, have important effects on firm behavior and organizational identity.

To the extent that a given firm's business model or strategy does not fit easily into established analyst specialties, it will attract coverage from a heterogeneous set of analysts and thus have a more ambiguous identity. In this manner, stocks vary in the extent to which they lend themselves to categorization by analysts and idiosyncratic patterns of diversification that would make sense seen because of a company's unique set of resources and competences can be inherently risky for listed companies, since they will not be understood by analysts. By generalizing these findings, it may be suggested that listed companies, when making choices about strategic course of action, have to take into consideration the possible reaction of security analysts, since it is the analysts' anticipated consequences, rather than management's, that will ultimately

affect the company's market value. An important implication of this idea is that, as a whole, analysts may hinder the feasibility of innovative business models that, because of their uniqueness, lack similar others to be compared with by analysts. Put differently, analysts may constrain, rather than enable, innovative behavior.

### *2.2.3. Determinant of analyst coverage and favorableness*

Given the importance of analyst coverage to firm and investors, considerable research has tried to understand the criteria employed by analysts to decide which companies to cover. Most of this research has focused on analyst coverage rather than favorability because very few recommendations are to sell and, as nicely put by Jensen (2004), "obtaining coverage is almost always the same as obtaining positive coverage". These studies model analyst coverage as a dependent, rather than independent, variable, susceptible to be influenced by various typologies of firm characteristics. A basic findings is that analysts are more likely to cover firms if they have favorable expectations about their future performance and the benefits of coverage exceed the costs of coverage (Bhushan, 1989; McNichols & O'Brien, 1997). Analysts prefer not to cover poorly performing firms because unfavorable coverage could jeopardize future investment banking business<sup>4</sup>, make management less willing to provide information, and reduce trading commissions from investors (McNichols & O'Brien, 1997). Analysts also prefer stability in the portfolio of firms they cover because they invest considerable resources in gaining accuracy in forecasting the earnings of the firms they cover and are punished for inaccurate earnings forecasts by being more likely to lose their jobs (Mikhail *et al.*, 1997; 1999). Early research suggested that analysts base their coverage decisions on economic firm attributes predicting future performance, such as firm size, financial performance, and growth rate (Bhushan, 1989). Sociological research, as previously noted, showed that analysts seek external validation of their coverage decisions among other analysts, and that significant mutual influence among analysts exists (Rao *et al.*, 2001).

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<sup>4</sup> More on this below.

More recent research has enriched our understanding of the determinants of coverage by suggesting that many other variables may predict analyst attention to a focal company. Jensen (2004) found that alliance announcements affect analyst coverage, but at a decreasing rate, i.e., the amount of analyst coverage firms obtain increase at a decreasing rate as firms announce more alliances. Other research (Lang & Lundholm, 1996; Healy, Hutton & Palepu, 1999; Bushman, Piotroski, and Smith, 2003) suggests that analysts are less likely to be attracted by firms with governance problems, since such firms are likely to be less forthcoming in terms of disclosure, giving analysts less information to work with in assessing investment potential. Lang, Lins & Miller (2004) add to this stream of research by finding that analysts are less likely to follow firms with *potential* incentives to withhold or manipulate information, such as when the family or management group is the largest control rights blockholder, particularly in countries where shareholder protection is low.

Other contributions have instead discussed the ways companies have to *actively* influence analyst coverage or favorableness, very often in the context of investor relations literature. Since security analysts may exert considerable influence over companies, it comes to no surprise that listed companies have organized themselves in order to “court” analyst opinion, manage their expectations and ensure a realistic assessment. Security analysts are in fact, along with institutional investors, the primary target of investor relations activities. Investor relations has been defined as “the management of the relationship between a company with publicly traded securities and the holders or potential holders of such securities” (Investor Relations Society, 1997). Investor relation is about the disclosure of all information that could have an impact on investment decisions. Regular disclosure topics include earnings, dividend policy, changes in corporate officers, and the like. Investor relations department started to diffuse in the US among listed companies starting from the beginning of the 1980s. According to Rao & Sivakumar (1999), security analysts’ heightened scrutiny was one factor that impelled firms to create such departments, in order to facilitate interactions with them and shape their opinions about the firm.



Overall, the issue of how listed companies influence security analysts is not much studied. A literature search in the fields of finance and financial accounting reveals a lack of scholarly contributions addressing the issue, with the exception of a few monographs providing background information (Useem, 1993; 1996). Corporate communication and public relations literature, on the other hand, have devoted a few contributions to the issue of investor relations and made occasional reference to security analysts. The area is however considered under-researched (Dolphin, 2004; Marston, 1996). An interesting exception is Marston & Straker (2001), who conducted a survey of European companies that provided descriptive statistics about methods of communication used by responding companies to security analysts. They found that the most important communication methods consist in answering telephone queries, individual (one-to-one) meetings, and general meetings targeting analysts from different organizations. Symmetrically, Lees (1981) found that analysts' most important source of information about the companies they follow came from interviews with corporate executives.

As a whole, it seems that the area of the way through which investor relation departments influence security analyst has not attracted much scholarly attention. A part of the explanation of this lack of research is that managerial attempts to influence the value of their firms are considered deemed to failure under the "orthodox" financial economic perspective, i.e., efficient-markets hypothesis (e.g., Modigliani & Miller, 1958; Miller & Modigliani, 1961). Another possible explanation for this lack of research is the fact that since analysts should be neutral and independent, companies' attempt at influencing their opinion are somehow suspect. A related literature has however examined the possibility that companies use means different from the simple disclosure of information and impression management techniques to influence analysts: however, instead of criticizing covered companies for undue pressures, most of this literature cast a shadowy light over the analysts themselves, and over their employers, investment banks and brokerage houses.

#### *2.2.4. Conflicts of interest and analyst credibility*

Security analysts have been recently brought to general public attention because of their involvement in corporate finance scandals. The collapse of the Internet bubble played a part in this heightened attention: well-known e-commerce analysts were criticized for maintaining buy recommendation on many dot-com stocks even as their valuations collapsed. In the US, congressional hearings are underway to consider reforms in order to protect naïve investors who lost money because of overoptimistic advice. Further, individual investors are seeking restitution through the law (Dobson, 2003). Indirect support for these allegations comes from a number of financial economic studies that, as previously noted, show that analysts' forecasts are, on average, optimistically biased in that they tend to be above actual earnings (Brown, Foster & Noreen, 1985; Stickel, 1990; Abarbanell, 1991; Dreman & Berry, 1995; Chopra, 1998). Together with the evidence that only a limited part of recommendations is to "sell" securities (Beneish, 1991), this heightened attention has induced scholars to "analyze the analysts" and investigate issues of analyst career concerns and conflict of interest.

Generally speaking, conflict of interest arise in two main ways in organizations: first, when self-interested actors may not properly perform their duties for their clients or their firms; second, when intraorganizational groups perform duties for at least two parties who each have conflicting goals or objectives (Hayward & Boeker, 1998). The latter is the case of security analysts within investment banks. While analysts should provide objective and independent advice to investors, by rating securities as "buy, hold, sell", corporate finance departments within the same banks competes to undertake capital offerings and merger and acquisitions for many of these same firms. Analysts therefore issue ratings of firms that may themselves be current or prospective clients of the investment bank's corporate finance department. Conflicts may arise because, whereas corporate finance seeks to promote its clients' deals through favorable ratings, analysts seek to rate corporate finance clients independently and objectively, i.e., not necessarily favorably (Hayward & Boeker, 1998). The potential for conflict may be better appreciated by considering on the one hand that analysts do not directly generate

revenue for the banks that employ them; on the other, analysts affect the ability to attain and execute clients' mandates. Company managers tend in fact to avoid working with investment banks whose analysts are critical of them, and negative ratings hinder the likelihood of obtaining business from such companies (Michaely & Womak, 1999)

Conflict of interest may damage the reputation of both investment banks and security analysts. To lessen these risks, remedies have been set up by both the employers' and employees' associations. As regards the latter, professionals usually have to sign ethical codes of conduct. For example, The Financial Analysts' Federation, a body governing analyst standard of behavior in the US (Friedson, 1986), issue the title "certified financial analyst" to analysts who pass qualifying exams and sign a code of ethics. Such code states that the security analyst "shall use particular care and good judgment to achieve and maintain independence and objectivity" and "when making investment ratings ... shall disclose to his clients any material conflict of interest relating to him ... which could reasonably be expected to impair his ability to render unbiased and objective advice". Investment banks, on the other hand, have set up a set of rules and procedures to prevent one department from obtaining information prejudicial to the customers of another: the so-called "Chinese walls". These metaphorical barriers, however, have been said to be commonly disregarded when hindering commercial objectives (Galant, 1990), to the extent that, according to some, they are just impression management tactics (Poser, 1988).

"Conflict of interest are difficult to observe firsthand" (Hayward & Boeker, 1998). Consequently, researchers that have investigated the issue have typically employed secondary data for both dependent variables (i.e., analyst ratings), and independent variables measuring the influence of corporate finance (i.e., whether covered securities are underwritten by the analyst' investment bank). Overall, evidence shows that an analyst from an investment bank that has an underwriting relationship with a stock tends to issue more positive predictions than analysts from nonaffiliated banks (Dugar & Nathan, 1995; Dechow, Hutton, & Sloan, 1998; Hayward & Boeker, 1998; Lin & McNichols, 1998; Hong & Kubik, 2003).

Notably, research over the conflict of interest issue has not analyzed the way individual investors react to advice from analysts that are in a situation of conflict of interest, i.e., reporting over a company which is a customer of the analyst's investment bank. Basic findings in social psychology (see chapter 1) would predict that, in this situation, the analyst would be considered less credible (specifically, expert *but* not trustworthy) and, consequently, their opinions would be "discounted". Yet, social psychological research tends to employ experimental designs, which are not much employed in the disciplines of finance and financial accounting, where most studies of investor behaviour have been conducted at the aggregate market level. The few experimentation-based studies that deal with the topic (Hirst, Koonce & Simko, 1995; Cote, 2000), in fact, dedicates considerable attention to justify the reasons that led the authors to investigate investor behaviour through an experiments rather than the empirical-archival methods that are common in finance.

More in detail, Hist, Koonce & Simko (1995) find that the investigated subjects attributed the reason for a research report from an analyst whose firm offers both investment-banking and research-analysis services more to that analyst's incentives to be favorable than they do for an identical report from an analyst whose firm only performs research analysis. Moreover, the subjects judged the company's stock as having less potential when an unfavourable report originates from an investment-banking analyst than when it originates from a non-investment banking ones. When negative opinion is provided despite the existence of contrary interests, analyst credibility seems to increase. Similarly, Cote (2000) shows that investors use analyst forecasts to infer the analyst's credibility. When a forecast is perceived to be optimistically biased, the credibility of the analyst lower relatively to an equally pessimistic forecast bias. Furthermore, such credibility assessments directly affect the extent to which investors rely upon the analyst's forecast when making their own predictions. As a whole, the findings of these studies are consistent with the discounting principle of attribution theory..

### 2.2.5. Hierarchies of security analysts

A transversal theme in the literature so far reviewed is that not all analysts are equals: some are more influential than their peers, have greater compensations, and are abler to resist from external pressures. The existence of ranking and hierarchies of expertise and credibility is a characteristic common to many typologies of opinion makers. In the case of security analysts, however, publicly available rankings exist (at least in the context of the United States): it is for example the case of the ranking issued by the *Institutional Investor* magazine, the All-American Research Team (II AART), which is based on an annual poll conducted among money managers. Analysts compete intensely for position in such rankings, both for intra-professional status and for the increases in compensation granted to analysts of high rank (Eccles & Crane, 1988). Besides this kind of rankings, another measures of the position of individual analysts within the profession depends on employer prestige. Hong & Kubik (2003) note that among investment banks, there is a well-defined hierarchy of prestige (e.g., Goldman Sachs or Merrill Lynch are of higher status than others), and being an analyst at a more prestigious bank is considered a better job, both for compensation and individual reputation.

The existence of “measurable” indicators of the position occupied by individual analysts within the professional hierarchy enabled researchers to test how such variable affect different outcomes of interest. Empirical research provide considerable support to the view that hi-status security analysts: (i) are more accurate then their lower status counterparts; (ii) issue recommendations that have a greater impact on stock prices; (iii) significantly influence the recommendations of lower-status colleagues; (iv) are less subject to conflict of interests.

As far as *accuracy* is concerned, it was previously suggested that financial economic researchers have generally portrayed security analysts as inaccurate forecasters and unprofitable investment advisors. Some studies have however showed that not all analysts are equal to this respect, since some are more accurate (or less inaccurate) than others. Mikhail *et al.* (1997) found for example a statistically

significant decline in the absolute value of analyst forecast errors as firm-specific experience increases. Other studies specifically investigated *Institutional Investor* magazine's All-Star analysts. Brown & Chen (1991) found evidence of the superiority of their earning forecasts. Similarly, Stickel (1992) showed that "stars" had smaller average annual earnings forecast errors than other analysts. Finally, Cox & Kleiman (2000) tested whether inclusion in the All-Star ranking conforms to the Yule distribution, that implies that luck rather than differential expertise explains success: consistently with previous findings, they found that such distribution is not an accurate description of the phenomenon. In sum, forecasting proficiency may increase with experience, and "star" security analysts are actually more experts than most colleagues.

As far as the *impact of recommendations* is concerned, Stickel (1992) found that the higher the II AART ranking, the greater the impact of the analyst's buy/sell recommendations on temporary stock-price movements. In a subsequent article, Stickel (1995) found similar results for the 1988 to 1991 time period. On the other hand, Mikhail *et al.* (1997) found that the stock recommendations of more experienced analysts were not more profitable than those from less experienced analysts. In sum, it is not clear whether the recommendations of analysts of different status affect prices in differentiated ways: perhaps, future research taking into joint consideration other variable may lead to more definitive results over this issue. As far as *social influence within the profession* is concerned, similar to what happens in other settings (e.g., medical experts, see par. 2.3), high-status security analysts decision to initiate or abandon coverage of a firm's security affect other analysts and may indeed start informational cascades (Rao *et al.*, 2001). This view is consistent with neo-institutionalism, according to which the actions of others perceived to be more successful and legitimate (DiMaggio & Powell, 1986) are likely to be imitated.

As far as the *conflict of interest issue* is concerned, Hayward & Boeker (1998) propose that high-status analysts are more able to work autonomously and to counter their companies' corporate finance departments' influence. This is thought to occur for two main reasons: (i) their opinion has greater currency and value to both clients and their firm; (ii) they have a greater reputation beyond the firm, greater job market

mobility, and are thus less dependent on corporate finance. Correspondently, these authors show that prestigious analysts (with prestige measured on the basis of the IIBART ranking) issue ratings that are significantly lower than peer ratings. In a similar vein, Phillips and Zuckerman (2001) show that middle-status security analysts, with their insecure standing within the profession, are those most affected threatened by the retaliation of the companies they cover, while high-status ones are in the position to be more autonomous and to buffer undesired influence.

A final note regards dynamics by which security analysts improve their status and, figuratively, climb up their professional hierarchy. By stating that analysts imitate each other, and particularly high-status colleagues, institutional sociology does not shed light on the mechanisms through which security analysts may acquire status. On this, Beunza & Garud (2004), in their interesting article on analysts as frame makers, suggests that status improvement may result from behavior that is remarkably different from that adopted by the majority of colleagues. The authors employ a rich case study centered on the figure of US security analyst Henry Bloget and the recommendations he issued on Amazon.com's securities. The article highlights issues of competition for status among analysts, and shows that the proposition of calculative frames, recommendations, and earning forecasts which were much different from those previously prevalent in the field, enabled Henry Bloget to generate enormous status for himself. The point shares some remarkable similarity to that proposed by Deephouse & Carter (2004) in their discussion of the differences between legitimacy and reputation: while isomorphism and imitation of others' behavior leads to the former, only behavior that is significantly different from that of others may lead to the latter.

### *2.3 – Medical experts and the diffusion of medical innovations*

As previously discussed (par. 1.4.1) scientific experts are employed by general assignment and specialized reporters to shed light over science-related journals. This occurs also in the case of health-related issues, where medical scientists and researchers are asked to comment over newsworthy diseases and treatments. These general findings remain valid also in the case of medical scientists and researchers. Population surveys

conducted in some countries show that the media are one of the most important source of information about important health issues, such as weight control, HIV/AIDS, drug abuse, asthma, family planning and mammography (Chapman & Lupton, 1995; Simpkins & Brenner, 1984). Medical experts at the top of their hierarchies of credibility are employed by specialized and general journalists as authoritative sources of information about diseases, new developments in treatments, and the like.

Similarly to what happens in other contexts, the medical and scientific community has often criticizes medical news as reported in the media, as distorted, superficial, oversimplifying the complexities of medical research, failing to contextualize risks, and sometimes raising false hopes (Kristiansen, 1988; Klaidman, 1990). In the context of the AIDS crisis, for example, with a certain frequency news have reported very optimistic reports of developments in vaccine or treatment drugs, while at the same time avoiding considering the costs, complications, and problems of access, and have been criticized by the medical scientific community for this reason (Crawshaw, 1990). Other research shows that some diseases receive proportionally more media coverage than others, although they may be rare and have lower incidence (Kristiansen, 1983; Freimuth *et al.*, 1984). These patterns of media reporting may even influence the funding of medical research: Crandall (1991) argues for example that the attention media devoted to AIDS, cancer research may have been granted less financial support than it may have otherwise received.

Research on media sources employed by medical journalists, overall, seems to replicate general findings for journalists *tout court*. First, the notion of objectivity seems to apply in this context, too. For example, Anderson (2001) concludes that although pharmaceutical companies' public relation activities are an important sources of information, they may affect the coverage of issues but not their content, since more neutral sources (typically, medical experts) are employed in order to tell audiences both sides of the story. Although interviews to individual experts (as also found by Shibley & Prosterman, 1998) at the top of their domain's hierarchy of expertise are important sources of information, particularly for topics "of the day", other studies suggest that opinion makers' influence over media content may be mediated by publications on



academic outlets. Van Trigt *et al.* (1994), for example, found that scientific medical literature is the most important source of ideas and information for journalists writing about medical issues and medicines; the second most important source is constituted by the contacts of researchers with journalists, both direct (i.e., through personal or telephone interviews) and indirect (i.e., through press releases from universities). The literature has also documented the potential sources of conflict in the interaction between journalists and medical experts deriving from differences in the respective professional cultures (Peters, 1995): the former assign more importance to a critical function of the mass media than the latter, and feel more strongly than experts that the media should stand on the side of the underprivileged. Experts, on the other hand, believe that worrying readers, e.g. by reporting research without clinical significance, may generate false hopes or unjustified fears that conflicts with their valued belief, "primum, non nocere". As a consequence of these different views, the risk of incomprehension and difficult relationships do exist.

The 'divulgarion' of expertise to the general public may however be seen as the last phase of a much longer process, that starts with scientific research and the development of new drugs, the approval of such drugs for by public health authorities, and the dissemination of knowledge about new treatments to medical practitioners. In such processes, the lines that separate scientific research and medical education on the one hand, and pharmaceutical marketing on the other, are blurred and hard to separate. These high levels of interconnectedness are mirrored by the streams of literature that have specifically investigated medical opinion makers, which are highly differentiated with respect to the pragmatic interests that are served (i.e., public health, pharmaceutical companies, and the medical profession), and the manner specific practices are evaluated (i.e., 'good' or 'bad').

More in detail, a first stream of literature has investigated the patterns of social influence among medical practitioners and the possibility to exploit them in the process of adoption by physicians of the clinical guidelines issued by public health institutions. Since educational top-down approaches have a limited effectiveness in changing physician behavior, various studies have explored opinion leadership phenomena

among medical practitioners, continuing a tradition that dates back to Coleman, Katz & Menzel's (1959; 1966) classical study about the role of professional and friendship networks in the diffusion of drugs among physicians. More recent research has highlighted the role played by opinion makers (here referred to as "expert opinion leaders") in this context, whose involvement is seen as a necessary (but not sufficient) condition for the successful adoption of guidelines.

A second, more limited stream of research has analyzed the involvement of opinion makers (i.e., medical scientists and researchers) in the context of pharmaceutical companies new drug development and marketing initiatives from the point of view of the pharmaceutical companies themselves. Research findings, as a whole, tend to downplay the extent to which doctor prescribing behavior is influenced by this kind of involvement and to promote a view of the involvement of opinion makers as necessary and benefiting all the parties involved and, ultimately, also public health and patients

Quite a different stance is instead adopted in the third, final stream of research here reviewed, produced by the medical profession itself and some sociologists of science. According to the former, it is very often stated (also in the context of heated editorials in leading peer-reviewed medical journals) that pharmaceutical companies' marketing practices have a 'corrupting' influence over the 'neutrality' of scientific research. The involvement of key opinion makers in clinical trial design, clinical diagnostic criteria development, the dissemination of scientific knowledge about pharmaceuticals is seen in a negative manner, as a possible source of conflict of interests that endangers the credibility of the profession as a whole, has stimulated a serious concern and the emanation of guidelines aiming to separate "neutral" scientific research and medical education initiatives from "biased" pharmaceutical marketing. The view adopted by sociologists of science, as a whole, while less emotionally charged and less likely to demonize pharmaceutical companies, is in general supportive of the medical profession point of view.

### 2.3.1 – The role of “expert opinion leaders” in the diffusion of medical guidelines

Patterns of social influence have long been documented among doctors and health practitioners in general. Results of related research have been employed by both pharmaceutical companies and public health institutions: if the former have an obvious interest in the marketing and competitive advantage implications of these results, the latter try instead to apply them in order to exploit professional networks and hierarchies of expertise to diffuse an “evidence-based medicine” approach among practitioners. In this section, the literature on the diffusion of the medical guidelines that are an important instrument of evidence-based medicine is reviewed. Pharmaceutical marketing efforts employing opinion makers (and the reactions, grounded on ethical and reputation considerations, of the medical profession) will instead be analyzed in the following section.

Public health organizations have long been concerned on the problems arising from the variance in clinical practice regarding similar diseases and medical conditions. Such problems consists in: (i) the fact that practitioners may employ treatments made obsolete by more recent research; (ii) cost-effectiveness considerations (particularly in countries where health care is State-funded), linked to the fact that more expensive treatments are often prescribed also when less costly ones are available and, according to updated research, are as effective as the former. In both cases, public health institutions very often issue clinical guidelines, whose aim is to transfer research evidence into clinical practice and promote standards of behavior among medical professionals. Guidelines condense large amounts of medical literature for easy use by doctors, and may be also employed in quality assurance and improvement efforts (Berg, Atkins & Tierney, 1997). Pathman *et al.* (1996) describes a linear process for guideline adoption that includes the following stages: (i) awareness of the guidelines; (ii) intellectual agreement (or disagreement); (iii) the decision to adopt; and (iv) the regular adherence to, or integration of, guidelines in daily practices. Collins, Hawks & Davis (2000) observe that the influence of traditional continuing medical education programs (e.g., conferences, lecturers, workshops) generally stops at either the awareness or agreement steps, and does not necessarily lead to adoption.

The limited effectiveness of traditional educational programs has led public health institutions to explore other instruments that may ease the successful implementation of medical guidelines, one of which is the exploitation of opinion leadership phenomena and, more in general, of patterns of social influence among practitioners. The importance of interpersonal networks of professional influence among medical practitioners for the diffusion of new treatments have been documented since Coleman, Katz & Menzel's (1959; 1965) widely quoted studies. Since then, the role of opinion leadership phenomena in promoting guideline adoption has been widely studied and two systematic reviews of the parceled empirical evidence so far produced are available. Davis *et al.* (1995) concluded that the involvement of opinion leaders through targeted educational initiatives is one of several effective implementation strategies. More recently, a review of the most rigorous studies on this topic (Thomson O'Brien *et al.*, 1999, also called the 'Cochrane review') provided only limited support to their use as an intervention to help guideline adoption<sup>5</sup>.

Of more interest for the purpose of this section is the fact that more recent research<sup>6</sup> (Locock *et al.*, 2001) identified two categories of opinion leaders, termed as "expert" and "peer"; such categories oversimplify a more complex reality, as it is possible to be both a peer and an expert, but one role may be more prominent than the other in particular situations. The '*expert*' opinion leader, often an academic or consultant, is a credible authority on the topic or situation for which advice is sought, and is able to explain the empirical evidence available and respond convincingly to challenges and debate. In other word, the expert opinion leader is considered as "someone who knows what he/she is talking about". The '*peer*' opinion leader is instead someone who can relate problems to the working lives of those who seek advice

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<sup>5</sup> It is worth noting that in the Cochrane review, only evidence coming from randomized controlled trials that meet rigorous methodological criteria is considered. In their comments to such study, Locock *et al.* (2001) observed that "[s]ix of the seven trials that measured health professional practice showed some improvement for at least one of the professional practice outcome variables measured, but only two trials were found to provide strong, statistically significant evidence of a clinically important effect .... In three trials that measured patient outcomes, only one achieved an impact on practice that was of practical importance".

<sup>6</sup> This study is somewhat noteworthy in that it employs qualitative methods (i.e., a multiple case-study design), which are relatively rare in the context of medical scholarship, which is dominated by a positivistic paradigm.

and give them confidence that they could do the same, too. The influence of peers over colleagues is largely based on perceived similarity, rather than on expertise alone. Collins, Hawks & Davies (2000), similarly, identify two types of networks of influence, which they term, respectively, "technical advice seeking" and "trust and friendship". "expert opinion leaders" and "technical advisors" are concept that, to a great extent, are striking similar to that of opinion maker, particular if we consider the fact that their opinions are typically diffused not only through informal personal contacts, but also through the specialized media, e.g. by authoring articles in the literature, through speeches and training sessions at conferences and in professional clubs, and in some cases through mass media coverage.

Successful adoption of clinical guidelines, then, seems to require both peer and expert opinion leaders. The relative persuasiveness of the former with respect to the latter will then depend on the stage of the guideline adoption process in which they intervene. In order to a guideline be accepted by a community of doctors, "a spectrum of involvement is needed, from expert academic through expert clinician to peer clinical opinion leader" (Locock *et al.*, 2001). The value of the former will especially lie in the initial phases, because experts may endorse the evidence and translate it into a form which is understandable by practitioners. Although convincing from a purely cognitive point of view, these endorsement may not be sufficient to adopt a guideline: on this, Greer, Wolf & Dettman (1995) observed that practicing physicians often feel that the information obtained through the scientific reports they read on scientific journals or listen to at conferences and symposia are inadequate to determine whether study and own patients are similar enough for the suggested practice to be actually transferable. Indeed, opinion maker may be perceived as "too academic" (Locock *et al.*, 2001) to be persuasive in this phase. Consequently, physicians may look at local evaluators of the innovation, in order to obtain information about the local fit. Peer opinion leaders seems more important in these final phases of the guideline adoption process, because they provide a role model for fellow practitioners, and give them confidence on the applicability of the innovation based on knowledge of their working lives.

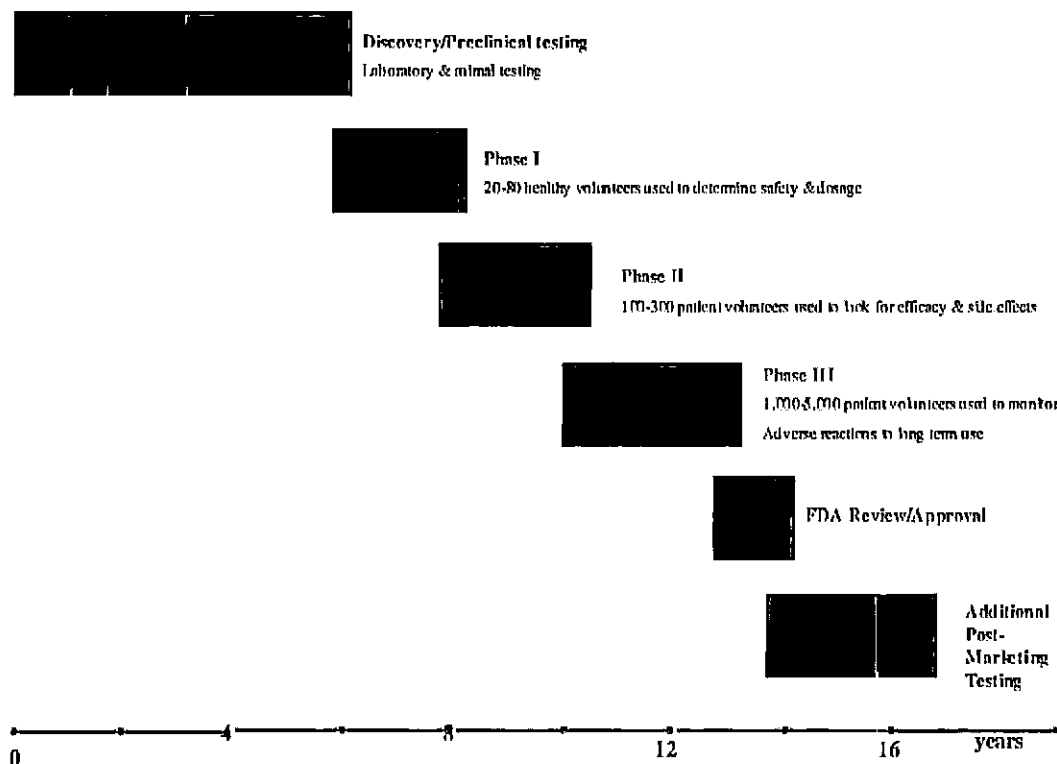
As a whole, research findings in this stream of literature are hardly different from 'general' opinion leadership findings, in spite of the nature of the individuals taken into considerations (i.e., professionals, either working in private practices or hospitals rather than individuals involved in consumption activities). Much like their 'consumer' counterparts, medical opinion leaders are more exposed to the information coming from the media (that in these contexts are scientific conferences, peer-reviewed medical journals, continuing medical education initiatives). As a whole, the stream of literature here reviewed explicitly acknowledges the role of opinion makers as a necessary (albeit not sufficient) condition for guideline adoption. Further, such an involvement is seen as appropriate and 'ethical': as shown in the section that follows, when medical opinion makers are involved in pharmaceutical companies new drug development and marketing initiatives, things become much more controversial.

### *2.3.2 – Experts, new drug development, and pharmaceutical marketing: The industry's point of view*

Pharmaceutical R&D is a long and risky process. According to the US association of pharmaceutical companies, it generally takes 10 to 15 years identifying, isolating, and refining promising compounds that will become the new drugs launched on the market; further, only one of 5,000 screened compound will ever be approved as a new medicine; finally, only three of 10 marketed drugs produce revenues that exceed R&D costs (PhRMA, 2003). The process requires subsequent phases of research trials to assess the clinical potential of candidate compounds before they can be submitted for approval by the competent regulatory agencies (e.g., the Food & Drug Administration, FDA, in the US), as shown in Picture 2.1. This process has become over the years longer and more complex, as sophisticated scientific tools are invented and more focused biomolecules are targeted. In addition, regulatory agencies increasingly require more extensive and complex data before granting the approval needed before a pharmaceutical innovation may be marketed. Once a drug is approved, adoption and use of new medicines and techniques requires dissemination of knowledge about the new treatments available to the physicians that will evaluate them for their patients. Medical researchers are involved by pharmaceutical companies in all these phases: they help

R&D efforts, they are precious for obtaining a seal of approval by the competent regulatory agency, and they exert the distant, technical influence that, as seen in the previous section, is a necessary condition for the adoption of a new treatment.

**Picture 2.1 – Phases of new drug development process**



Source: Pharmaceutical Research and Manufacturers of America, based on data from Center for the Study of Drug Development, Tufts University, 1995

In spite of their undeniable importance, literature addressing the role of opinion makers in new drug adoption is very limited: it seems that, as a whole, pharmaceutical companies are user, rather than producers, of knowledge about the patterns of social influence within the medical profession. Although some specialized, peer-reviewed outlets exists (e.g., *Health Marketing Quarterly*, *International Journal of Medical Marketing*), only seldom explicit reference to opinion makers is made, mostly in the context of studies investigating the sources of drug-related information employed by physicians and other health care professionals. Physicians employ both industry-dominated sources (e.g., detailing visits, free drug samples, promotional material, sponsored informative events) and that coming from (supposed) 'neutral' third parties,

dominated by the medical profession and in which opinion makers play a significant role (e.g., peer-reviewed medical journals, scientific conferences, continuing medical education initiatives). As seen in the previous section, colleagues are also important sources of information, and patterns of social influence within professional networks exist. Most studies published in journals targeting pharmaceutical marketers conclude that information coming from industry sources is usually considered less useful (e.g., Spiller & Wymer, 2001) and less reliable (e.g., Güldal & Şemin, 2000) than those coming from sources perceived as not self-interested.

A recent article (Dumovic & de Vries, 2004) moved from the 'demand-side' approach of the previous studies to analyze the multiple ways through which the pharmaceutical industry is involved in medical education. While the purpose of the article is to propose recommendations to pharmaceutical companies and medical researchers in order to protect their credibility, it provides a description of the use of expertise in pharmaceutical marketing, and for this reason it is here reviewed in detail. In this contribution, opinion makers (defined as 'key opinion leaders') are explicitly acknowledged and the sequential ways in which they are employed in medical education initiatives is discussed (see Table 2.2 for an overview). Firstly, scientists and researcher who cooperate in the clinical trials required for approval end up authoring articles submitted to peer-reviewed literature and, "[b]ecause of their work, these authors become the specialists in the behavior, safety, risks, patient selection and appropriate application of the new drug". Further, industry plays a role in the development of practice guidelines "by supporting meetings of experts to develop guidelines". Finally, pharmaceutical companies significantly invest in medical education, through the promotional events organized in connection with the launch of new drugs and the sponsorship of Continuing Medical Education (CME) initiatives. Both kinds of initiatives involve the independent researchers previously involved in clinical trials: "[i]nvestigators often are the most qualified experts about the drugs they have researched and may serve as authors and faculty at educational events. Frequently, these researchers also are national opinion leaders in their specialties because they have the expertise and knowledge from their clinical research".



**Table 2.2 - Pharmaceutical industry's involvement  
in the information sources employed by physicians**

<b>Source of information</b>	<b>Pharmaceutical industry involvement</b>
Peer-reviewed literature	- Advertising (subsidies to publishing costs) - Submission of articles authored by industry scientists
Clinical practice guidelines	- Support of expert meetings that develop guidelines; - Literature and data from industry-sponsored clinical studies is used as a basis
Medical education initiatives	- Financial support of CME initiatives; - Speakers have often expertise built-up thanks to the involvement in industry-sponsored research trials

*Source:* Elaborations based on Dumovic & de Vries, 2004

Beside Dumovic & de Vries' (2004), I found no other article mentioning opinion makers in the pharmaceutical marketing literature. The benefits deriving from opinion maker involvement in pharmaceutical marketing have however been described in the pharmaceutical managerial press (Robinson, 2002), which is here reviewed because of the insights it provides on the best practices emerging in the industry. Opinion makers, in this context, are referred to as "thought leaders", i.e. individuals at the top of their respective hierarchies of expertise, defined by current institutional affiliation, academic title, publications in peer-reviewed journals, relevant professional activity. According to the piece, the 'scope' of these experts may vary from the global to the national, and lower-levels leaders, all of whom may have occupy specific and differentiated roles in pharmaceutical companies' marketing plans. According to the various consultants whose opinions are reported by Robinson (2002), experts considered as thought leaders may be identified throughout the drug development cycle. In the earliest stages of a product's development, world thought leaders may be targeted for involvement in Phase I and II clinical trials. Key national and lower level thought leaders may be instead involved two-three years before launch, to shape Phase III trials and participate in them with their patients. Local leaders may be engaged in conferences during the months preceding launch. In earlier stages the role of thought leaders is seen as to provide input and specialized knowledge to new product development (e.g., identification of

therapeutic opportunities, suggestions for clinical trial design and measurement issues, evaluation of safety and efficacy data). In more advanced phases, the role of expert endorsement seems more directed to influencing colleagues.

Practitioners seems to be aware of the fact that a too strict involvement with industry may compromise thought leaders' perceived objectivity and reputation: "when a certain physician becomes too closely aligned with a product his or her words lose credibility" (Robinson, 2002). To limit risks of losing reputation, it is advised that thought leaders "guard against overly associating with just one company" and "comply with requests for disclosures of industry support". In other words, a neat difference exists between thought leaders and advocates (that are also employed by industry): while the latter's purpose is to "have his or her peers adopting a treatment guideline or option, or a product", the former best serves industry needs by maintaining its neutrality and trustworthiness. "By turning to a 'disinterested' thought leader, the company accepts the risk that a respected expert may convey a mixed picture about a product's value... But the company is rewarded by the increased credibility of that testimony".

To sum up, although opinion makers are widely employed by pharmaceutical companies at all stages of the new drug development process, only very few contributions explicitly deal with them. Most of this literature deals with the sources of information employed by doctors and their and relative persuasiveness, and research findings generally promote a view of the independence of judgment of the medical profession from industry-dominated sources. Opinion makers are expressed taken into consideration by just two studies, and both seem preoccupied with the risks for pharmaceutical companies (and the experts themselves) in terms of the possible loss of credibility and legitimacy. These empirical findings tend as a whole (and not surprisingly) to be supportive of the view that cooperation among the pharmaceutical industry and medical practitioners benefits all parties involved, including, ultimately, the patients. The image of the world painted by these contributions is however rather different from that proposed by critics of the pharmaceutical industry, as it will be shown in the section that follows.

### 2.3.3 – *The critics within the medical profession's view: no 'free lunches'*

When considered from the point of view of the medical profession, the tone of the literature regarding pharmaceutical marketing practices in general, and the involvement of opinion makers in such practices in particular, is rather different. The interaction between the pharmaceutical industry and the medical profession is one of the issues most subject to heated discussions among practitioners (e.g., Erola, 1994; Guyatt, 1994; Waud, 1992; Woollard, 1993). In US, it has been estimated that US\$ 8,000 to US\$ 13,000 are spent per year on each physician (Drake & Hulman, 1993; Randall & Kennedy, 1991), and it is argued that such investment would require returns beyond simple brand awareness and goodwill. Not surprisingly, many professional societies have developed guidelines to modulate the interactions between physicians and pharmaceutical companies, and the issue is increasingly subject to regulation. What emerges is a preoccupation grounded on ethical considerations and, more pragmatically, on the risks of a loss of legitimization and credibility of the profession as a whole, which depends upon a perceived objectivity of judgments.

Research, on this, shows that interaction between medical professionals and the pharmaceutical industry starts as early as during medical schools (Hodges, 1995), and continues well into practice. Marketing practices more or less controversial include industry-sponsored meals, samples, gifts, honoraria, conference subsidies, and research funding (see Wazana, 2000, for a review). For example, medical professionals believe that representatives provide accurate information about their own drugs (Strang *et al.*, 1996), but are less certain on the quality of the information provided on established or alternative drugs (Caudill *et al.*, 1996; Strang *et al.*, 1996; Hodges, 1995; McKinney *et al.*, 1990), and tend to believe that representatives prioritize product promotion above patients' welfare (Strang *et al.*, 1996) and are likely to use unethical practices (Hopper, Speece & Musial, 1997; Keim *et al.*, 1993). As far as gifts from the industry are concerned, most medical professional deny that they could affect their behavior (Gibbons *et al.*, 1998; Hodges, 1995; McKinney *et al.*, 1990; Caudill *et al.*, 1996;) and are equivocal about the ethics of gift-giving in this context (Hopper, Speece & Musial, 1997; Sergeant *et al.*, 1996); at the same time, however, many admit that without gifts

their interactions with representatives would be reduced (Caudill *et al.*, 1996; Hodges, 1995; McKinney *et al.*, 1990). Similarly, it is believed that conference attendance would decrease without industry-paid meals (Lichstein *et al.*, 1992). The external funding and involvement in continuing medical education (CME) initiatives by industry is particularly stigmatized (e.g., Relman, 2001): research on CME courses funded by rival manufacturers showed that their contents was biased in favor of each sponsor's product (Bowman, 1986), and that physicians who attend industry-supported CME initiatives subsequently alter their prescription practices in favor of the sponsor's products (Bowman & Pearle, 1988).

The involvement of opinion makers in pharmaceutical companies' marketing practices is seen by its critics within the medical profession as a conflict of interest. Critics argue that the involvement of scientific researchers in drug development and, particularly, medical education, may result in undue influence over doctors' prescribing behavior, i.e., 'rational' prescribing behavior is undermined. In other words, it is feared that such involvement is questionable on ethical grounds, since it may unduly affect the influenced medical professionals' clinical judgment, and conflict with the profession's fundamental principles of responsibility: acting in a patient's best interests (beneficence); protecting the patient from harm (nonmaleficence); having respect for the patient and fostering informed choice (autonomy); and promoting equity in health care (justice) (e.g., Coyle, 2002).

As far as the involvement of medical experts (at all levels of their respective hierarchies) in industry-sponsored trials is concerned, although many commentators would agree that it may contribute to the understanding of the benefits and risks of new products (and hence promoting the principles of beneficence and nonmaleficence), ethical considerations exist. In the case of top-ranking experts, involved in Phase I and II trials, it is argued that a bias could exist in the publishing of research outcomes. On this, empirical research shows that physicians with financial ties to pharmaceutical manufacturers are significantly more likely than independent researchers to report findings that support the sponsor's drugs, and less likely to report unfavorable research results (Brennan, 1994; Friedberg *et al.*, 1999; Cho & Bero, 1996; Rochon *et al.*, 1994;

Davidson, 1986). In her position paper on ethics and physician-industry relationship, Coyle (2002) suggests that, in order to maintain objectivity, researchers should “secure pre-performance agreements with sponsors ensuring that negative results will not be quashed and that findings will be made publicly accessible”. This view is being institutionalized, since the International Committee of Medical Journal Editors has recently agreed not to publish any studies conducted under conditions in which the sponsoring company may control the data or prevent publication (Davidoff *et al.*, 2001). Although of not easily enforceability, this norm provide a measure of the perceived risks deriving from expert-industry interaction in the production of knowledge about drugs.

For lower-level experts, involved in phase III and IV trials, the conflict of interest mainly regards the patient autonomy and informed choice principle. On this, Coyle (2002) argues that physicians have an ethical obligation to disclose their commercial ties to patients who are prospective study participants; moreover, conflicts may exist over what is best for the patient, and what is best for the conduct of the research. In weighing the two interests, it is argued, researchers should prioritize their role as physicians over their role as investigators (Drazen & Koski, 2000). Also receiving compensation for referring patients to an industry study when the physician does not directly participate in the trials is considered questionable, because these so-called “finder’s fees” represent pure profit and create inherent conflict with the patient’s best interests (Lind, 1990). Finally, some research is considered questionable by the medical profession on the basis of the supposed lack of scientific validity and potential to enhance medical progress (Freedman, 1987); in this case, it is argued that physicians “should not participate in studies that are, in effect, thinly disguised promotional schemes to entice physicians to use new products” (Coyle, 2002).

Another practice scrutinized by critics within the medical profession is the public endorsement of specific medical products or services by experts in the context of mass media (e.g., articles, editorials) or specialized media (e.g., medical journal reviews). Sometimes, it is argued, physicians accept commissions to sign content that is ghost-written by pharmaceutical companies or public relations firms in attempts to

influence the public opinion over certain issues (Brennan, 1994). Such paid efforts, of course, are considered as “particularly suspect” and “unethical” (Coyle, 2002).

The involvement of medical experts to speak on behalf of a company in the context of conferences and continuing medical education initiatives may also be criticized on ethical bases. Here, it is argued that “a company will retain only individuals who make statements or recommendations that are favorable to its products, thus compromising the physician’s scientific objectivity” (Coyle, 2002), and that any industry sponsorship or affiliation should be disclosed to audiences. Another possible risk derive from pharmaceutical companies’ involvement in the production of educational material in the context of continual medical education initiatives (that are to a great extent financed by the pharmaceutical industry). Here, it is recommended that “physicians retained as lecturers in such settings control the content of the educational modules they deliver rather than allow their presentations to be scripted by the company. Lecturers should screen industry-prepared presentation aids ... to ensure their objectivity and should accept, modify, or refuse them on that basis. Presenters using such materials should disclose their source to audience members” (Coyle, 2002).

To recap, pharmaceutical companies acknowledge the existence of a hierarchy of opinion makers in the context of every medical specialty, and have developed over time a sophisticated comprehension of the different ways to enter in relation with them in the context of their marketing activities. These interactions between medical experts and the pharmaceutical industry are however seen with serious concern by member of the medical profession, since both anecdotal evidence and empirical research suggest that professional objectivity may be jeopardized by these relationships. For every single case, however, it is difficult to discern what is legitimate and what is not: however, professional values and ethics suggest that physicians’ duty is to advocate and act in the best interest of patients, and as such they are expected to serve as independent and trustworthy sources of health care information. Some pharmaceutical marketing initiatives have the risk to generate dual commitments and conflicts of interest. As a consequence, that of medical opinion makers and pharmaceutical companies is an uneasy alliance.

### *2.3.4 – Intersections of pharmaceutical research and marketing: Insights from social studies of science*

Sociologists of science have produced their own accounts of the practices through which pharmaceutical manufacturers enlist medical researchers and clinicians into their commercial enterprises. As a whole, most of these contributions do not add significantly to our knowledge of this phenomenon; yet, they adopt an 'external' gaze to such practices and, in most cases, rather than stigmatizing the pharmaceutical industry they highlight responsibilities within the medical profession. It is the case, for example, of the issue of 'ghost-writing' that, according to Healy (2004), is relatively common in medical research, even though sufficient hidden that it is not possible to gain a sense of how common. According to the scholar, researcher working for pharmaceutical companies routinely write papers reporting results of research trials that, before being submitted to peer-reviewed medical journals, are sent to putative authors, primarily academics, for authorship. This practice appears to be coherent with the principles of persuasive communication, as identified by social psychological studies: since persuasiveness is a function of both expertise and trustworthiness, by having authors not directly involved sign a study supporting a new drug's merits, its effectiveness increases. Clearly, 'pharmaceutical companies would not meet their objectives were their ghostly roles known' (Sismondo, 2004). The payoff for the researchers that accept to cooperate is the possibility to add it to the record of publications, with the consequent benefits in terms of academic prestige and career advancements.

Another stance of the 'neutral' stance of sociological research when examining pharmaceutical research and marketing is the work of Rasmussen (2004) that investigates from a historical perspective the evolution of the understanding of ethical issues in the interaction of medical scientists and pharmaceutical companies in the first half of the 20<sup>th</sup> century in North America. At the beginning of such period, academic scientists believed that association with pharmaceutical companies was problematic, at least for their reputation in the academic field. By the 1940s, the situation had changed considerably, and academic-industrial collaborations had become the norm (Parascandola, 1992; Swann, 1988). According to Rasmussen (2004), the

institutionalization of commercial collaboration was driven by both 'material' and 'symbolic' reasons. Materially, what pharmaceutical companies wanted from researchers was access to new scientific drugs that could be easily marketed. Such an access could be gained by the collaborating firm in three different ways: (i) through exclusive access to the techniques and tacit knowledge developed by researchers; (ii) through granting exclusive rights to use the name of a compound made famous by its scientist discoverers as a trademark; (iii) through individual scientists taking patents on their work and to subsequently assign or license exclusively to the collaborating firm. Although scientist patenting was controversial at beginning, and no scientist could have taken patents without serious risks to their reputation for integrity, over the years two main arguments were developed to legitimate this practice: firstly, it was just for industry to help foot the bill of the expensive research from which it would profit; secondly, a patent could help protect the public from bad medicine, by preventing unscrupulous manufacturers from launching on the market shoddy products.

According to Rasmussen (2004), however, material elements alone cannot explain the diffusion of scientist patenting. Pharmaceutical companies, at least in some cases, would have preferred exclusive access to tacit knowledge or trade marks but, since each of them cooperated with scientists from different universities, the latter feared that the resulting dissemination of knowledge could benefit their academic competitors, i.e., researchers working on the same questions that could, in this way, 'win' the publication race. Also, pharmaceutical companies tended to pressure cooperating scientists not to publish or delay publication of important findings, in order not to benefit competitors from 'their' R&D investments; this however contrasted with scientist motivation and reward system within their academic institutions. "[L]ife scientists chiefly wanted status-enhancing publications of new knowledge and/or recognition for developing important new medicines". Notwithstanding typical protestations that medical patents were a necessary evil forced upon the life scientist by the nasty realities of commerce, patents were so common in the interwar era because many life scientists preferred them. Scientists were free to publish fully and thus to reap credit for authorship".



Sociological research add to our knowledge of opinion maker-pharmaceutical industry by providing rich case studies that enable a more nuanced comprehension of the phenomenon. It is the case for example of the notable Fishman (2004), that employ an ethnographic research design to analyze the involvement of academic researchers through the drug development promotion and process in the case of the use of testosterone and Viagra to treat what is now known as the female sexual dysfunction. Fishman (2004) documents the involvement of medical researchers not only in the conduction of research trials, but also in a number of other activities. While this kind of activities were noted in the review conducted in the previous sections (e.g., Dumovic & Vries, 2004), this study adds new details and a richer understanding of how “overlapping and interwoven” pharmaceutical research and drug promotion are nowadays. More in detail, according to Fisherman (2004), medical opinion makers mediate and facilitate pharmaceutical companies’ relationships with: (i) regulatory agencies (e.g., the US FDA), (ii) clinicians, (iii) the ‘lay’ public (i.e., potential consumers of new drugs).

As far as the *relationship with regulatory agencies* is concerned, academic medical researchers collect clinical trial data and verify the clinical applicability of the drugs under investigation: a necessary step before a new drug may be approved. Put differently, medical opinion makers create markets for new drugs, by establishing a disease diagnosis and an appropriate patient population (i.e., a need and a target group). Such a phenomenon is particularly evident in cases of the so-called ‘biomedicalization’ of conditions (Clarke *et al.*, 2003), i.e., when lifestyle or quality of life issues start being considered a disease, a condition that has to be met before regulatory agencies may start considering approval. This appeared to have happened in the case of female dysfunction disease. The phase II trials of a new product treating low ‘female sexual desire’ (developed by Procter & Gamble Pharmaceuticals in conjunction with Watson Pharmaceuticals) were reported in the *New England Journal of Medicine* in September 2000 (Shifren *et al.*, 2000). Soon after, an announcement was circulated for a conference entitled ‘Androgen Deficiency in Women: Definition, Diagnosis, and Classification’, to be held in summer 2001 in Princeton, NJ, USA. The conference was organized by three of the authors of the *New England Journal of Medicine* article, and

funded by pharmaceutical companies with testosterone products in development. The purpose of the conference was to develop a 'consensus statement' of the definition, diagnosis, and classification of an 'androgen deficiency syndrome in women'. International experts belonging to several disciplines described research data (to each other and to the general audience) and, before the end of the conference, developed a consensus document that appeared in the journal *Fertility and Sterility* in April 2002 (Bachmann *et al.*, 2002). Regulatory agencies employ such documents to provide authoritative definition of a disease, "despite the contradiction that the disorders were often identified on the bases of the symptoms that a new drug can help alleviate" (Fishman, 2004). Pharmaceutical companies hence benefit from collaboration with experts, who have their own incentives to cooperate: by helping create official documents that become part of the drug regulatory process, they "construct themselves as indispensable guides" in such a process and, at the same time, they position themselves at the top of the hierarchy of expertise that is in this way created.

As far as the *relationship with clinician* is concerned, Fishman (2004) describes the activities of female sexual dysfunction researchers serving as faculty at CME conferences. Although US regulation states that pharmaceutical manufacturers (that fund almost all CME conferences) should separate their grant-making functions from their sales and marketing functions, educating clinicians about new developments in medical treatment is *de facto* 'intertwined with pharmaceutical promotion and marketing'. In the case investigated by Fishman (2004), the faculty (and organizers) at CME conferences for sexual dysfunction are the same researchers who conduct industry-sponsored research on related drugs. "By sponsoring SME conferences and enabling researchers to present data on new in-trial drugs, pharmaceutical companies, in conjunction with academic researchers, are able to promote and 'brand' their drugs to clinicians *before* the DFA has granted approval for the drug's release'. This may create concern when 'off-label' uses of available drugs are discussed at CME initiatives. Physician are in fact permitted to prescribe drugs for uses different from those approved by regulatory agencies, and the practice is rather common. In the case here examined, since Viagra and testosterone therapies are approved from men, they are available as off-label prescriptions for women. The benefits of these practices for pharmaceutical

companies are evident: opinion makers create awareness about new drugs before they are publicly available and promote their off-label prescriptions for not-yet-approved uses; further, although content, to a great extent, is determined by pharmaceutical companies<sup>7</sup>, the source appears to be an independent, neutral third party. Benefits for involved experts are nevertheless tangible: they are well paid to serve as faculty at CME conferences; further, their interaction with clinicians (both nationally and internationally) enhances their reputation in their own research fields, since they become associated to the chemical compounds they study and, symbolically, climb the relative hierarchy of expertise.

Finally, as far as the *relationship with the general public* is concerned, medical opinion makers spread news about the availability of new treatments through the mass media. Fishman (2004) reports the cases of two medical researchers, Drs Jennifer and Laura Berman, sisters and co-directors of the University of California at Los Angeles Female Sexual Medicine Center, that from prominent figures in FSD research became 'celebrity expert' on the issue. In February 2001, the Berman sisters appeared twice on the Oprah Winfrey television show, to promote their new book *For Women Only: A Revolutionary Guide to Overcoming Sexual Dysfunction and Reclaiming Your Sex Life* (Bergman & Bergman, 2001). During the two hour-long shows, they acted as experts answering the public's questions. The shows were a success, and their book became a best-seller soon after the appearance. In the book, the Bergman sisters describe how they prescribe (off-label) Viagra to their women patients and discuss the benefits it could have for women with sexual problems. So, while Pfizer (Viagra's producer) cannot provide information to the general public about the off-label use of Viagra, Bergman & Bergman (2001) can tell women about its availability and how it can be prescribed. In 2001, the Bergmans launched their own Internet site, [www.NEWSHE.com](http://www.NEWSHE.com) (Network for Excellence in Women's Sexual Health), which targets women seeking help in dealing with sexual function problems. The site features several articles dealing with the off-label use of Viagra and hosts pharmaceutical companies' banners. Further, they make available on the site findings from trials that have not been submitted to peer-reviewed journals. By promoting themselves to broad

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<sup>7</sup> Fishman (2004) even discovered that it is not uncommon that researcher PowerPoint presentation be prepared by pharmaceutical companies' personnel.

audiences, medical researchers help promote the drugs targeting diseases to which they are associated: in other words, they help create 'anticipatory' markets bases before new drugs are launched on the market.

To recap, the sociology of science literature sheds light over the exchange networks among pharmaceutical companies and medical researchers in which all parties involved benefit both materially and symbolically. For the former, the involvement of medical researchers permits to spread messages that are mostly perceived as coming from a neutral, unbiased source. For the latter, involvement with pharmaceutical companies permit to obtain benefits in terms of publications, status, reputation. The results of this interconnectedness is that dissemination of scientific knowledge about pharmaceuticals and their promotion are overlapping and interwoven. Opinion makers, by virtue of their expertise and legitimacy as 'truth seekers' act as mediators between pharmaceutical companies and all other actors involved, included, ultimately, the patients-consumers. In no other context, the issue of conflict of interest reaches the proportion found within the pharmaceutical industry, both for the huge investments involved and the nature of the goods involved: human health and life.

#### *2.4 – Managerial gurus and the diffusion of managerial practices*

Since the early 1980s, popular management thinkers, often referred to as management gurus, have become an important feature of management thought, particularly (but not only) in North America. These authors have up to millions of readers worldwide and are a powerful force behind the diffusion of organizational ideas and practices of different kinds, including, *inter alia*, Total Quality Management, Business Process Re-engineering, Knowledge Management, the Learning Organization, environmental standards and certifications. As experts, management gurus may be seen as opinion makers fostering significant organizational change and influencing organizational buying of consultancy projects, often decided at the higher levels of the organizational hierarchy. Unlike the other typologies of experts analyzed so far, however, management gurus are not generally supposed to be neutral in their opinions, since all of them have vested interest in championing their own peculiar management

idea or techniques, because of the private returns that accrue to them in terms of reputation, book sales, consultancy and applied research projects, and the like<sup>8</sup>.

Scholarly interest in management gurus dates back to the beginning of the 1990s, when the first contributions appeared. The topic seems to have become fashionable, nowadays, at least judging from the proliferation of conference papers, published articles, books and special issues of peer-reviewed journals that focus on management gurus or management fashions, since the two streams of literature are inextricably linked. This heightened scholarly attention to gurus contrasts with academicians' common attitude to "dismiss popular management writing as inferior to "real scholarship" in one way or another" (May & Zorn, 2001). The practices championed by management gurus are (not surprisingly) described as fads or fashions, i.e., after surges in interest, they are abandoned. The terms fashion, fad and guru are all pejorative, i.e. they connote in a negative way the phenomena they describe. After all, following fashions and gurus is not what serious and rational managers are supposed to do. Yet, management gurus, with their work, significantly influence managerial practice whereas, unfortunately, the same cannot be said about most academic research. The increased scholarly interest in the topic may be partly motivated by a desire to understand the factors which account from the success and impact of management ideas (Newell *et al.*, 2002; Clark, 2004), with the possible vested interest of learning how to become a management guru, a motivation expressly catered for in the title of one of the first books on the issue (Huczynski, 1993a). Two streams of research may be identified in the related, growing literature: (i) the role management gurus play in the management fashion-setting process; (ii) the explanations behind the popularity and impact of their success.

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<sup>8</sup> Conflict of interest, hence, is not an issue for this typology of experts, although some consultancy-based gurus have been sometimes accused of unethical behavior. The magazine *Business Week* (1995) exposed a scheme aimed to manipulate the sales of the book *The Discipline of Market Leaders* to let it enter *The New York Times* best-seller lists. Employees of the consultancy company where the two authors worked were supposed to have bought more than 10,000 copies of the book, and channelled corporate purchases of an additional 30,000 to 40,000 copies, with the intent to raise the book's profile on the *Times* list.

#### 2.4.1. *Management gurus and their role in the management fashion-setting process*

The available literature distinguishes among management gurus on the basis of professional background. Most of them fall into one of the categories that follow (Huczynski, 1993a; Davenport, Prusak & Wilson, 2004).

- *Academics*, particularly when teaching in business schools, are in the position to become management gurus, to the extent that their research is characterized by both rigor and managerial relevance. The incentive structure of academic institutions, however, often encourages the former more than the latter, since tenure is obtained with publication of articles in peer-reviewed journals that most managers would find hard to understand. As a consequence, only seldom university faculty becomes managerial gurus, although notable exceptions exist, e.g., Michael Porter (Harvard) and C.K. Prahalad (University of Michigan).
- *Consultants* are in the position to become gurus because of their professional experience, thanks to which they may visit and work with a variety of companies in the context of real problems. As a consequence, the knowledge they develop is likely to have practical relevance. On the other hand, most consultants will never write a book or article, because they lack time. Further, they create or diffuse management ideas mainly for marketing purposes, i.e., to create more business for their companies. As such, they may be perceived as less credible by the audiences they try to influence.
- *Practicing managers* (or “hero managers”, as Huczynski (1993) call them), particularly the CEO of large, successful companies, are in the position to diffuse the management approaches their companies have adopted (and have been shown to work). Prominent examples include Jack Welch of General Electric or, less recently, Alfred P. Sloan of General Motors, who have both published books describing the accomplishments of their companies. While most of them are (similarly to consultants) too busy to write books or articles, they may count on their companies’ communication or public relations budgets in order to have their books promoted.

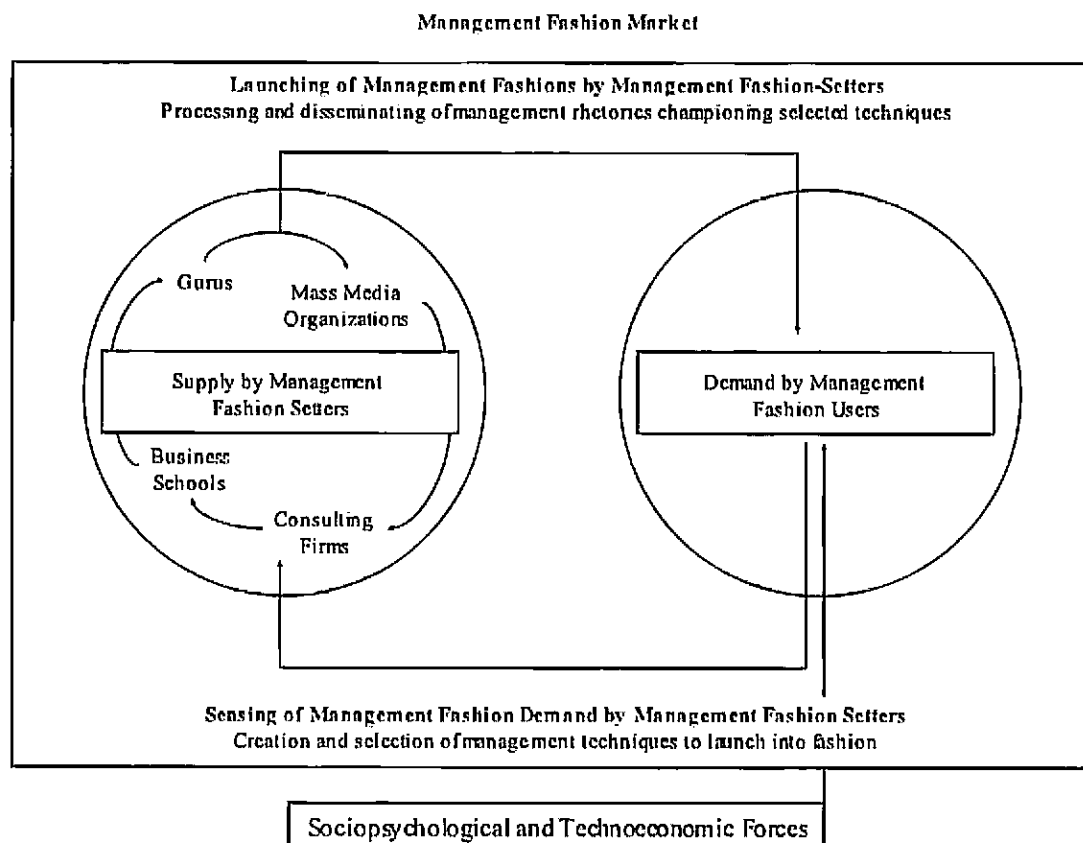
– *Business journalists*. Similarly to what occurs in other contexts, specialized journalists may sometimes be considered experts in their fields and provide visibility to some of the techniques they discover during their routine interactions with companies. Media organizations are in effect considered important members of the fashion-setting community (Abrahamson, 1996), and some journalists have sometimes authored popular management books. Yet, in this field of management writing, there are few journalists who have become management gurus (Davenport, Prusak & Wilson, 2004).

It must be noted that management gurus tend to be boundary spanners. “Consultants may teach and often manage their own firms; business-oriented professors may well do consulting and even occasionally become managers; CEOs may become consultant or teachers when they retire” (Davenport, Prusak & Wilson, 2004). Further, most gurus, in spite of the fact that they are widely known, have a marginal position within their own professions. Academic gurus may be perceived as not enough rigorous by their colleagues; consultant gurus don’t necessarily gets the same status and compensation of their more focused colleagues; manager gurus may risk to be perceived within their company as distracting their time from legitimate occupations for personal reasons (Davenport, Prusak & Wilson, 2004).

As previously noted, much of the available literature regarding management gurus is intertwined with that on managerial fashions, according to which management ideas and techniques are subject to swings in fashion in the same way as other aspects of social life. This stream of research traces its lineage to the widely quoted Abrahamson’s (1991, 1996) seminal papers on the management fashion-setting process. By drawing on the literature on the diffusion of innovation (Rogers, 1983) and neo-institutionalism (DiMaggio & Powell, 1983), the author defines a management fashion as “a relatively transitory collective belief, disseminated by management fashion setters, that a management technique leads rational management progress” (Abrahamson, 1996). The fashion-setting process, on the other hand, is defined as “the process by which management fashion setters continuously redefine both theirs and fashion followers’ collective beliefs about which management techniques lead rational management

progress" (Abrahamson, 1996). The process is a highly complex one, characterized by many actors that interact in such a way that a demand and a supply for management fashions is created (see Picture 2.2 for Abrahamson's (1996) view of the market for management fashions).

Picture 2.2 – The Management Fashion-Setting Process



Source: Abrahamson, 1996.

Management fashions are seen to progress through the following sequence of stages (Gill & Whittle, 1993; Clark, 2004): (1) invention, when the idea is initially created; (2) dissemination, when the idea is initially brought to the attention of its intended audience; (3) acceptance, when the idea becomes implemented; (4) disenchantment, when negative evaluations and frustrations with the idea emerge; (5) decline, or the abandonment of the idea. Put differently, a distinctive feature of management fashion is that they fail to become fully entrenched in organizational fields; after periods of sustained interest, they are abandoned as organizations start following the latest fashion, much like consumers do for new styles of clothing or hair cut. Using



the language of neo-institutionalism (which, as previously noted, is one of the theoretical lenses through which the phenomenon has been first investigated), this means that management fashions fail to become fully institutionalized.

Most empirical research has focused on the dissemination stage of the management fashion-setting process. Empirical studies in this vein have investigated the diffusion pattern of management ideas over the print media employing citation analysis. In other words, references to a given managerial idea are tracked in appropriate media over longitudinal periods of time, in order to find evidence of the ideas' patterns of diffusion<sup>9</sup>. Results of these studies are in general supportive of the idea that most managerial ideas and techniques, after initial surges of interest, are abandoned, although the shapes of the curves for different ideas are not identical nor symmetrical and vary for different countries (e.g., Abrahamson & Fairchild, 1999; Benders & van Veen, 2001; Gibson & Tesone, 2001; Spell, 1999, 2001; Rinallo & Corona, 2003). Further, whilst the life spans of recent management fashions are considerably shorter than those for ideas that came to prominence in earlier periods (Abrahamson, 1996; Carson, Lanier, Carson & Guidry, 2000).

Within the management fashion-setting process, gurus play a significant role in the invention, dissemination, and acceptance phases. Dissemination is the most visible part of the process and, accordingly, most contributions have examined the ways gurus (and would-be gurus) employ to diffuse their ideas to management users, i.e., by launching a seminal management text and by engaging in a series of lectures. Wood (1989) suggests that three types of book may be identified: (i) books which offer analysis of a broad theme, with related prescriptions (e.g., the Japanese Management Model); (ii) books which focus on methods for improving the handling of a specific topic (e.g., motivation, leadership); (iii) reports of success stories which include studies of firms and individuals' accounts of their personal achievements.

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<sup>9</sup> The validity of this method is however questionable, as recently highlighted by Clark (2004), and for two reasons. Firstly, unless an article is content-analyzed, it cannot be assessed whether the reference is positive or negative, or whether the management idea is central or marginal to the article. Secondly (and more importantly), media dynamics are not necessarily linked to actual adoption by organizations. Managerial techniques may for example reduce over time their newsworthiness and stop being reported in media articles even when stably adopted by companies.

Also the lectures given during meeting and conferences are an important instrument through which the reputation of the management guru is built and the dissemination / adoption of the management idea he/she champions is fostered. Besides being successful authors, management gurus are in fact also successful orators, to the extent that the very nature of their expertise is believed by many authors to lie in the persuasive performances that take place in the context of their lectures (Huczynski, 1993a; Clark, 1995; Clark & Salaman, 1996; 1998; Greatbatch & Clark, 2002; 2003). Clark & Salaman (1998) suggest that “[g]uru performance are ... much more than mere dry exposition; they involve highly theatrical behavior, anecdotes, exhortation, challenge, threat, confrontation and humor”.

Less is known about what occurs *before* management gurus start disseminating their ideas, in spite of the importance of these phases to understand how academics, consultants, managers are transformed into management gurus. Of course, the ideas and techniques that will ultimately be popularized are based on observation of management practices. The professional activities of business school academicians, consultants, managers and journalists put them all in the position to observe first-hand managerial practices. That idea that management gurus actually *invent* management ideas and techniques is however to be downplayed. Many authors have noted that the ideas popularized by management gurus are hardly new, but are rather “old wine in new bottle”, since most “new” business ideas have been seen in some form before (Kimberly, 1981; Spell, 1999; 2001; Davenport, Prusak & Wilson, 2004). Further, commentators have recently cast a doubt on the fact that all management gurus actually write the books they become popular with. According to Crainer (1998), several recent management books have been ghostwritten, and specialized companies exist that help authors to become management gurus. Davenport, Prusak & Wilson (2004) suggest that “[t]he more currently active a CEO author is in managing his or her company, the greater the role of the ghost-writer in getting the book out”. Clark & Greatbatch (2004), in one of the few qualitative studies aiming to shed light on the initial phases of guru careers, actually interviewed some ghostwriters, finding that they are called to intervene by the publisher when gurus are not capable or lack the time to write.

The role of management book editors has recently been brought to attention by Clark & Greatbatch (2004). The authors found that for publishers, gurus' (or potential gurus') books are "star-based products", i.e., they will be bought because of the author's allure, rather than its actual content. In other words, they are marketed in order "to build a brand so that the author has instant recognition". Thus, popular management books are conceived by publishers as a specific kind of product, one that differs from others targeting managerial audiences and is based on the author's potential for becoming a celebrity. Further, in these cases publishers do not seek fully formed books that can be published as the are, with minor copy-editing. What is highly sought is high-potential ideas that may appeal to the management audience. These ideas are then shaped with the help of writing editors and, occasionally, ghostwriters. The resulting collaboration ends up in a text that shows two characteristics that could be considered the socially constructed conventional features of the popular management book (Clark & Greatbatch, 2004): (i) it is easy to read and remember; (ii) it emphasizes practical relevance for audiences. In sum, similarly to what happens in the field of cultural production (Hirsch, 1972), book editors may be considered as *gatekeepers* that select potential best-selling authors and then work closely with them in order to turn their ideas into products likely to be successful with the intended audiences.

#### 2.4.2. *Reasons for the impact of guru's ideas*

There is a number of available explanations for the success of guru ideas. Clark & Salaman (1998) provided a systematic discussion of the reasons that may be invoked to explicate the popularity and impact of gurus, a discussion that is characterized by a broad approach and the inclusion of supporting literature not previously considered to relate to the management guru phenomenon. These authors' explanations apply alternatively to: (i) management users; (ii) the management gurus themselves; (iii) the socioeconomic and cultural context within which they develop and disseminate their ideas. Curiously, most accounts of the success of management gurus tend to dismiss the actual content of guru ideas, since there are major doubts about the efficacy of the core ideas (Carroll, 1983; Clark & Salaman, 1996; Guest, 1992), and many critics have noted

that management gurus either “invent” management techniques that only appear to be novel or rediscover old management techniques that were previously invented and forgotten (Kimberly, 1981; Clark & Salaman, 1998; see McGovern, 1997 for an exception).

As far as *explanations regarding managers* are concerned, it must be noted that guru ideas most often than not target individual managers rather than the company as a whole. Before a company commits itself to a management idea, in fact, management gurus need to persuade individual managers that have to champion the idea of somehow changing their organization. Some features of management work that may heighten managers’ receptivity to guru ideas are the following (Clark & Salaman, 1998).

– *Psychological factors.* Most contributions on management gurus have tried to explain their impact on managers by proposing that their ideas are able to satisfy individual manager psychological needs. By reading a book or attending a conference, it is argued, managers are able to make sense of a menacing world which is increasingly unstable. Guru theory, in other words, helps managers “create a sense of order in the face of the potential chaos of human existence” (Watson, 1994). Versions of this argument may be found in Huczynski (1993a,b), Watson (1994), Jackson (1996) and Abrahamson (1996).

– *The nature of the managerial task.* A second type of explanations is based on the literature that examines the nature of managerial work. Analysis of a number of guru texts (Conrad, 1985; Freeman, 1985; Zibergeld, 1984) indicates that they are immediate, practical, concrete, superficial, and easily read and assimilated. According to Clark & Salaman (1995), such features resonates with those of managerial work, that according to substantial research developed in the last decades is characterized by brevity, spontaneity, fragmentation and discontinuity, adaptation to circumstances, superficiality, unreflectivity, and a focus on doing, on tangible, concrete objectives, and on the immediate. Thus, the appeal of gurus’ ideas may depend upon the fact that they are formulated in ways that are appealing and easily accessible to managers, because of their preferences for the nature and format of information, which are influenced by the nature of managerial work.

- *Management learning.* According to Clark & Salaman (1995), the nature of managerial learning (rather than work) may explain the fact that management ideas (or the ways they are formulated) are attractive for managers. Kolb *et al.* (1984), for example, suggest that managers may learn in distinctive manners, i.e., they might have action-focused learning styles (Honey & Mumford, 1986). Similarly, Rogers (1986) has argued that managers, as adults, would prefer learning episodes that are usually episodic in character, occurring in short bursts of intense activity; goal and task-centered; use demonstration; and avoid general principles.
- *The social aspects of management work.* Managers' attention and preference for management guru discourse may be explained by the social aspects of management work. Mangham (1990) suggests that management is a "performing art", or, in other terms, it "involves the reading and interpretation of events and circumstances and the expression and embodiment of that reading in action on the part of the managers. Action is eloquence". Gurus may have success because construct themselves as role models for managers (especially with their performance-based lectures). In other words, "gurus demonstrate these very qualities of performance, interpersonal charisma and 'eloquence' that managers admire and wish to master" (Clark & Salaman, 1998).

A second type of explanation has focused on *the management gurus themselves* and suggest that their impact may be due to the form, rather than content, of their ideas, i.e., the specific way in which they are conveyed to managerial audiences. Abrahamson (1996) argued that management gurus (together with other members of the fashion-setting community) develop rhetorics that "convince fashion followers that a management technique is both rational and at the forefront of managerial progress" (Abrahmson, 1996). Coherently with this view, the argumentative texture of popular management books authored by gurus tries to convince the reader that she/he has a problem, for which the idea proposed in the book offers the solution (Røvik, 1998). Recurring elements in such texts include (Kieser, 1997; Røvik, 1998): (i) promises of, preferably substantial, performance enhancement; (ii) the threat of bankruptcy in case of non-adoption; (iii) using well-known and successful users of the concept in question;

(iv) stressing the concept's universal applicability; (v) presenting the concept as an easily understandable commodity with a catchy title; (vi) presenting the concept as timely, innovative, and future-oriented; (vii) interpretative viability, i.e., leaving a certain room for interpretation.

Other scholars have suggested that the power of guru ideas may lie in the performance-based lectures that constitute a major way through which they are disseminated (Huczynski, 1993a; Clark, 1995; Clark & Salaman, 1996; 1998; Greatbatch & Clark, 2002; 2003). In this public performances, gurus seek to achieve transformations of consciousness in their audiences. Huczynski (1993a) employs Lewin's (1951) change model to argue that alterations in audience beliefs are the outcome of the three phases of a typical presentation: creating disequilibrium by challenging audience members' normative world-views (unfreezing); inducing guilt through the threat of damnation and the promise of salvation (changing); and enabling the audience to see familiar ideas and concepts in new ways (refreezing). Bringing these ideas to their extremes, Clark & Salaman (1996) suggest that in these performances, management gurus acts like a *witchdoctor*. Both witchdoctors and management gurus try to help their clients with problems, anxieties and stresses; the knowledge that gurus use may share properties with magical knowledge; and finally, the way in which both work, i.e., the performance itself, is similar, since it depends on the performer and his/her behavior, rather than on other resources or bodies of knowledge.

Finally, a number of commentators have highlighted the importance of the *socioeconomic and cultural environment within which management guru discourse emerges* to explain the reasons behind its wide adoption (Alvesson, 1990; Whitley, 1984; Willmott, 1993). The popularity of guru idea may lie in the fact that the management problems they deal with and the solutions they propose "resonate with and are in harmony with the expectation and understanding of their target audience" (Clark & Salaman, 1998). Grint (1994) proposes that social resonance occurs when ideas capture the *zeitgeist*, the "spirit of the time", and indeed, the *Economist* (1994, p. 80) suggests that any successful management guru must own a "nose for the *zeitgeist*". As a consequence, *macroeconomic fluctuations* could affect demand for guru theory. Barley

& Kunda (1992) suggest that long-term waves of economic expansion and contraction may parallel broad changes in managers' preferences for different types of management ideas. In phases of expansions, they argue, profits are dependent on capital investment and automation; consequently, there should be a demand for management techniques that increase the efficient use of structure and technologies. On the other hand, during periods of economic contraction, the excess of productive capacity leads managers to become interested in labor as a factor of production; consequently, there will be a demand for management techniques which stress employee relations as a means to increase efficiency and profitability. Thus, management gurus' success may be in part due to their ability to reformulate their ideas so that they are in harmony with dominant management discourse needs, as determined by macroeconomic fluctuations (Clark & Salaman, 1998).

Other scholars have noted the correspondence that guru ideas have with national values. Guest (1990) suggests for example that the success of guru theory in the United States is due to the fact that they resonates with values (e.g., optimism, simplicity, the focus on a dream, an idealized sense of possibility, the focus on individualism, and the view of the leader) that are dominant in US society. Similarly, Grint (1994) argued that the success of guru discourse in the US may be explained by the fact that they revived traditional US values in a historical moment where the global competitiveness of Japan was menaced by other countries (i.e., Japan) and their different values. By suggesting that external threats were due to an abandonment of traditional national values, management gurus were able to create powerful rhetorics that resonated with and were inherently attractive for their audiences.

### *2.5. A brief discussion: Converging Research Questions*

As noted at the present chapter's beginning, a comparative analysis of the research questions that have been investigated across literatures, which shows that a certain level of convergence exist over certain themes. Such themes, in certain manners, are similar to those highlighted in the previous chapter and referred to specialized journalists. (see par. 1.2.2), that are here jointly considered, as shown in Table 2.3.

**Table 2.3 – Converging themes across opinion makers and specialized literatures**

OM typology	Impacts	Determinants of attention / favorableness	Conflicts of interest	Hierarchies of credibility
Arts & Literature Critics	X	X	-	X
Security Analysts	X	X	X	X
Medical experts	X	-	X	X
Management gurus	X	-	-	X
Specialized journalists	X	X	X	X

The *impact opinion makers have over audiences, organizations, society as a whole*, is a common theme across literatures. In the previous chapter, these theme was discussed in the context of the diverging paradigmatic views regarding the relationships between media and society, according to which it is safe to conclude that opinion makers have limited effect, which are mediated by contagion within social networks (par. 1.4.3). As a whole, however, scholars investigating specific typologies of opinion makers have seldom acknowledged limits to their influence. In some cases, a broad type of influence over audience or society is assumed. Thus medical experts and journalists medicalize lifestyle conditions as diseases or construct social problems. Similarly, fashion and lifestyle journalists frame masculinities and femininities and legitimize appearance standards, with negative consequences for human health (e.g. eating disorders, body image dissatisfaction). In other cases, opinion makers diffuse normative frames that affect organizational behaviors: management gurus contribute to the popularization of management ideas and techniques (possibly, more than management scholars); security analysts' categorization of stocks had an impact over the diversification of conglomerate companies.

Finally, opinion maker influence is also discussed in term of product or service success: security analysts' forecasts and recommendations affect stock prices; critics provide visibility to cultural products that otherwise could not be promoted; medical researchers are instrumental in the launch of new medicines. In some cases, besides



being noted and commented, scholars employ statistical methods in order to *quantify* opinion maker influence. Most prominently, this occurred in the case of finance scholars and cultural economists, that have benefited from the availability of secondary data to model the impact of opinion maker attention and/or favorableness of reviews *vis-à-vis* other variables affecting product success econometric techniques (e.g., event studies, multiple linear regressions).

Other scholars have instead been mostly concerned with determining the *determinants of opinion maker attention or favorableness*. In most fields, opinion maker attention is rather limited and concentrated. Sport reporters cover certain specialties, teams, athletes more than others; science journalists tend to focus more on biogenetics than, say, astrophysics; literary critics review only a limited part of new titles. Since marginalization in the media has consequences, scholars have examined the determinants of opinion maker attention. This has led, for example, to discover the problems in science communication, grounded in the highly differentiated professional values between scientists and journalists. Similarly, book authors, to the extent that are involved in sideline activities (i.e., writing in literary magazines), tend to obtain more book reviews by literary critics.

In a different vein, other scholars have tried to shed light over the manners through which some opinion makers attribute value to products. In the case of both security analysts and literary critics, sociologists have found that attributing quality is a rather difficult activity: no "objective" criterion exists to evaluate works of arts; no precise manner exist to predict the future value of securities. In these situations, it is argued, opinion makers reach a consensus about the value of reviewed items by looking at each others. In the often tight occupational community of opinion makers, significant patterns of social influence exist. Also in this case, quantitative studies exist, mostly realized by sociologists and finance scholars. For this typology of research question, opinion maker attention and/or favorableness are considered dependent variables, and investigators try to quantitatively assess the relative impact of possible predictors. Another common influence on attention and/or favorableness consists in influence from those that should be covered. Thus, investor relations professionals target security

analysts; public relations practitioners target general and specialized journalists. When opinion makers report on innovations (e.g., fashion editors), news regarding products or services tend to be produced by the same companies that advertise them on the same media vehicles. This situation paves the way for advertising influence over media content.

Broadly speaking, *conflict of interests* arise when self-interested actors may not properly perform their duties for their clients or their firms; second, when intraorganizational groups perform duties for at least two parties who each have conflicting goals or objectives. Both kinds were noted by researchers investigating security analysts, scientists and researchers, and some typologies of specialized journalists. For security analysts, conflict depends on the fact that negative recommendations could damage present or prospect customers of their organizations, i.e., investment banks, putting colleagues in corporate finance departments in a difficult position. Conflict of interests are important because they damage not only the reputation of the people involved, but also that of the entire professional communities to which they belong, particularly when they are highly debated in mainstream media (e.g., security analysts in the US after the "Internet bubble"; medical researchers). Besides being described and commented, conflict of interests have been researched with quantitative methods. Much research documents, for example, the fact that analyst from an investment bank that has an underwriting relationship with a stock tends to issue more positive predictions than analysts from nonaffiliated banks. Similarly, research on industry-sponsored continual medical education courses showed that their contents was biased in favor of each sponsor's product.

To conclude, the existence of *hierarchies of credibility and/or expertise* is another recurring theme across literatures. This aspect was noted at the end of the review of the theoretical foundations of opinion making phenomena reported in par. 1.5. "Applied" research sheds further light on the fact that, within a given area of expertise, opinion makers are not equals. An interesting theme that emerges regards the patterns of status acquisition *within* opinion maker professional communities. Peer pressure, in most cases, leads to behavior that is legitimate but unlikely to improve reputation. Thus,

dissenting voices may attract the attention of colleagues and other stakeholders and, hopefully, make a name for themselves. Prominent security analysts increased their reputation in the eve of the dot.com era by proposing different frames for evaluating their stocks. Similarly, original, inventive viewpoint over works of arts are a strategy critics employ to gain renown. At least in the case of security analysts, quantitative research shows that being the “top guy” is consequential: higher rank professionals are more accurate in previsions, tend to be compensated more, are more shielded from conflicts of interests, and their recommendations impact stock prices to a greater extent. Perhaps, similar patterns are valid also in the case of other typologies of opinion makers.

Another interesting aspect that emerges from the comparative literature review here conducted regards the advantage experts have for entering the media arena. For a professional, being represented in the media as the “top guy” in one area of expertise implies a significant promotion of its activity. Thus, after appearing in television as experts in a specific medical condition, medical researchers who also run private surgeries may experience significant increases in the flows of customers. The risk of this strategy, however, is a loss in reputation. Bourdieu (1997) clearly despises the “media intellectuals” that use the media to obtain forms of legitimacy they failed to obtain (or did not have the patience to seek) within academia. Authors of best-selling books and very successful lecturers during meetings and conferences, popular management writers have not very high standing within academia and are considered by management scholars as “gurus” and purveyors of fashions. Their case is perhaps enlightening of the possible trade-off between occupational and media reputation.



### 3. Opinion makers in marketing: Literature review and research agenda

"Critics play a significant role in consumer's decisions in many industries" (Basuroy, Chatterjee & Ravid, 2003)

"Of all the information systems available to guide consumer choice, the mass media third-party source may be one of the most potent yet most neglected in the marketing literature" (Jolson & Bushman, 1978)

"Critics and their reviews pervade many industries. Judges, experts, cognoscenti, evaluators, analysts, and professional reviewers exist in various product and service categories such as book, music, high-technology products, universities, and many consumer durables. Few marketing scholars, however, have considered [their] potential role" (Eliashberg & Shugan, 1997)

"Journalists are especially important because they make their influence felt even before an innovation passes to its "early adopters"" (McCracken, 1986)

A common theme across the bodies of knowledge that have examined opinion makers is that they have to some extent the potential to affect organizations. Significant differences however exist among theoretical perspectives and typologies of opinion makers. For example, sociological conceptualization of critics and security analysts depict professional experts as powerful institutional forces, with influence over areas of organizational life much broader than the market success of cultural products or stocks. On the other hand, critical media scholars believe that some opinion makers (particularly those whose area of expertise reflects a leisure, rather than public interest, orientation) are almost powerless respect to the influence of the sources of information from which they depend. In marketing, opinion makers are mostly conceived as expert sources of information about products and services. Thus, marketing scholars have investigated their degree of influence over consumer decision-making and the strategies companies have to exploit the social mechanism of credibility within their promotional activities. The knowledge developed by marketing scholars is at the same time insightful and limited. It is insightful because it sheds light on how external opinion is

integrated into consumers' decision-making processes, and this is a unique contribution. On the other hand, the knowledge developed by marketing scholars is limited, since by focusing on consumer decision-making processes, it neglects other broader areas of influence that have nevertheless the potential to shape businesses, consumers, and markets. The purpose of the present chapter is to review the literature developed by marketing scholars, in order to highlight the main themes investigated and to contrast them with what is known from other disciplines and bodies of knowledge, with the ultimate goal to highlight future direction for research.

### *3.1. Literature review*

As a whole, opinion makers as a subject of scholarly research *per se* have not attracted much attention in marketing<sup>1</sup>. On the other hand, much research developed by scholars in this discipline is helpful in understanding the circumstances under which a demand for expert opinion will likely emerge and the manners such opinions will affect purchase processes. Thus, marketing research adds considerably to our understanding of opinion maker influence over consumers in their search of information about products and services. Further, a more limited stream of research has addressed the impact of specific typologies of opinion makers (e.g., movie critics) on the relative success of products and services. Other contributions have instead investigated the strategies marketers have available to employ experts within their promotional mix. The purpose of this paragraph is to discuss in detail this literature.

#### *3.1.1. Views on opinion makers in marketing literature*

In marketing, the literature provides two different views of opinion makers: on the one hand, they are considered expert sources of information about products and services; on the other, they are viewed as key agents in the gathering and transferring of the cultural meaning of consumer goods (see Table 3.1). These views are grounded in

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<sup>1</sup> Marketing is here intended in a broad sense, to include the body of knowledge developed by marketing scientists, consumer behaviorists, advertising and business communication scholars.

different theoretical perspectives and have enjoyed different levels of scholarly attention. The former is indeed the most influential, since it is grounded in a view of consumers as information processors that may be helped or influenced by others who are perceived as being more expert. This view has been prevalent in consumer behavior and find its theoretical basis in the huge body of literature on the consumer decision making process. Accordingly, the influence of opinion makers is felt only *after* the consumer has started an active search for information, as he/she, under certain circumstances, tends to rely on others' opinion.

**Table 3.1 – Views on opinion makers in marketing literature**

	<b>Expert sources of information about products and services</b>	<b>Agents in the gathering and transferring of the cultural meaning of consumer goods</b>
Subjects that are influenced	Consumers	Product designers and consumers
Moments in time where influence is felt	After consumers start a purchase process	Before product design starts
Consumer tasks over which opinion makers exert influence	Information processing to reach a purchase decision	Appropriation of meaningful properties of consumer goods

The cultural perspective on opinion makers (McCracken, 1986), on the other hand, stresses the fact that consumer goods have a significance that goes beyond their utilitarian character and commercial value, a significance that rests largely in their ability to carry and communicate cultural meaning (Douglas & Isherwood, 1978; Sahlins, 1976). In consumer societies, it is argued, “cultural meaning moves ceaselessly from one location to another” (McCracken, 1986), and according to this perspective opinion makers intervene in the processes through which cultural meanings are transferred to consumer goods in two different moments: (i) before products and services are launched or even designed, since they act as sources of inspiration for designers; (ii) when products are launched, since they help consumers to identify their

cultural significance and signifying ability. In spite of the relevance of this view, so far it has not received much attention by marketing or consumer behavior scholars.

The purpose of this section is to discuss both views on opinion makers. As previously stated, in marketing opinion makers are mostly conceptualized as *expert sources of information about products and services*. In other words, critics, experts and the likes are considered as providers of information that consumers can employ to facilitate their purchase decisions. This notion underlies a view of consumers as information processors, that may be helped or influenced by others who are perceived to be more expert *after* the consumer has started an active search for information. Consumers have in fact traditionally been regarded as active problem solvers (e.g., Bettman, 1979). The consumer recognizes a need, searches for information, evaluates alternatives, makes a choice and reacts to the outcomes of that choice. Thus, cognitive effort is expended to reach a purchase decision (Lutz & Bettman, 1977). Generally, greater information search is assumed to occur under some circumstances such as high risk, high price, or low experience with the product (Assael, 1984).

Consumers very often rely on others who are more experienced, more knowledgeable, or more capable of expending time and effort in the product search and evaluation process (Solomon, 1986, 1999). Research has shown that several different conditions may affect the likelihood of reliance on external sources for opinions over products and services. Others' opinions are sought by consumers in order to reduce cognitive effort or uncertainty as the *perceived risk* associated with a purchase increase (Dowling & Staelin, 1994; Roselius, 1971). Others' opinions are also relied upon in the case of *new products* and of products with *image-related attributes* (King & Summers, 1970), and when attribute information is lacking or uninformative, as in the case of experience (as opposed to search) attributes such as the handling ability, comfort of ride, and drivability of a car (Bone, 1994; Hoch & Ha, 1986). These findings suggest that in these cases, others will be relied upon as (more) expert sources of information (Beatty & Smith, 1987; Berning & Jacoby, 1974; Kiel & Layton, 1981; Urbany,



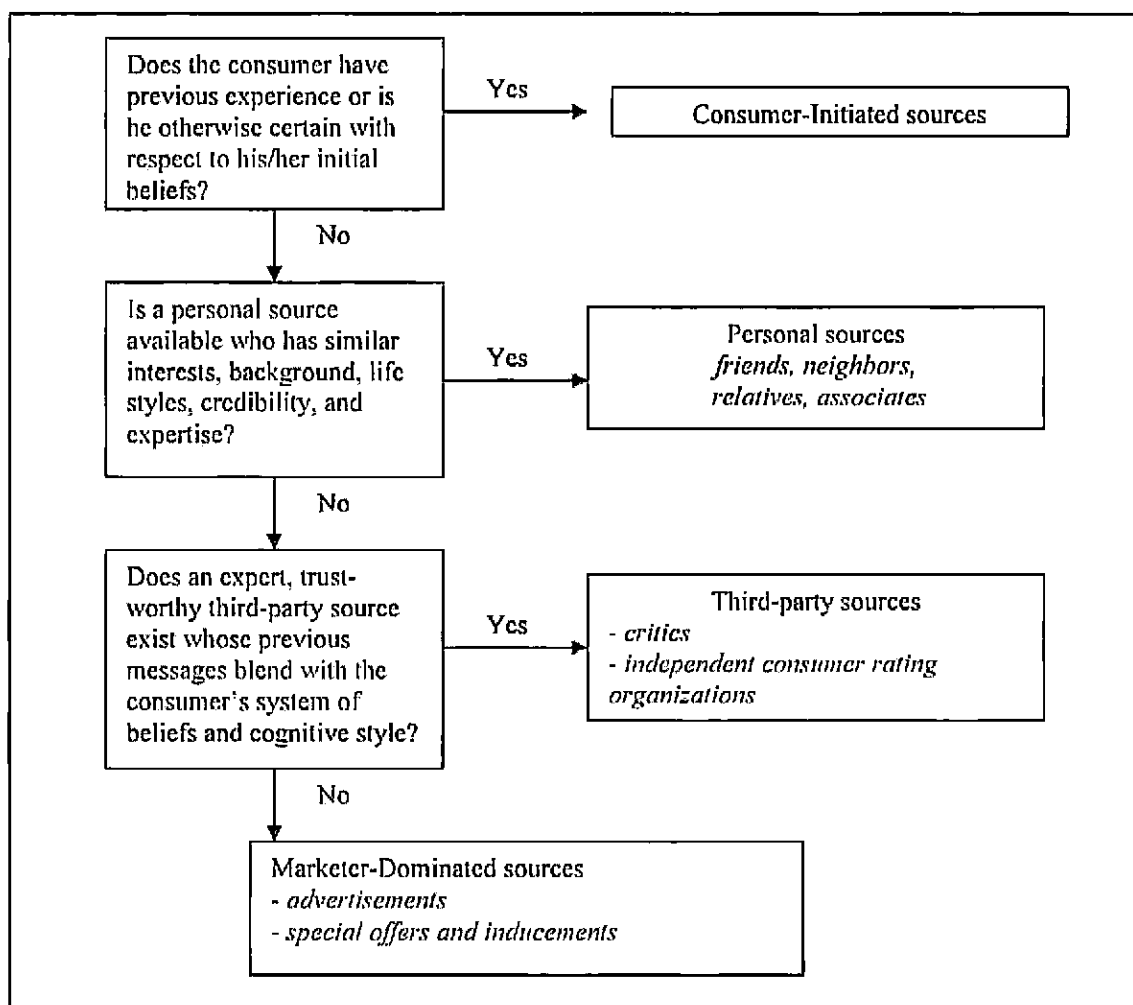
Dickson & Wilkie, 1989). Thus, early literature in consumer behavior has described the circumstances under which a demand for expert advice arises.

More recently, the experiential view on consumer behavior (Holbrook & Hirschman, 1982; Hirschman & Holbrook, 1982) has spread some contributions that suggests that for experiential products, whose dominant benefits are the feelings, emotions and sensations experience during the consumption experience, consumer behavior will likely differ from that for other types of product. Building on this assumption, Cooper-Martin (1991; 1992) distinguishes sources of information as experiential and non-experiential, and suggests that “[t]o learn about experiential products, consumer should turn to experiential sources which are distinguished by their ability to convey a sense of the consumption experience, that is, of what it is like to see, hear, taste, touch or smell this products” (Cooper-Martin, 1992: 756). Similarly, West & Bronirczyk (1998) also suggest that “[o]thers’ opinions are likely to be especially important for experiential products because they offer indirect experience on sensory aspects not conveyed by tangible attributes” (e.g. viewing a movie, eating at a restaurant, or sightseeing). Critics and other expert sources of information are considered among the “experiential” sources of information, at least to the extent that they provide information not only on a product’s objective features (e.g., price level) but also on subjective features that convey a sense of the consumption experiences. As a consequence, their opinions are believed to be significantly more useful and credible than non-experiential sources of information as far as subjective features are concerned, but not to differ in usefulness and credibility with respect to objective features (Cooper-Martin, 1992).

That said, expert advice may be provided by a plurality of sources. Jolson & Bushman (1978) were among the firsts to illustrate the sequence of consumer responsiveness to available purchase information sources (see Picture 3.1). Most notably, in the hierarchies proposed by these scholars, opinion makers (or expert third-party sources, to employ the model’s labels) are positioned *after* personal sources but *before* marketer-dominated sources. These ideas are consistent with basic findings in

both social psychology and media studies. As far as the former is concerned, marketers will be perceived by consumers as self-interested sources of information, and their messages will be likely discounted; opinion makers, to the extent that no doubts exist over their independence and trustworthiness, will be a more credible (and persuasive) source of information. On the other hand, the "limited effect" paradigm in media studies suggest that opinions expressed through the media are seldom influential unless they are reinforced within the social network to whom a focal individual belongs. When considering word-of-mouth and, most notably, opinion leadership phenomena, it is not surprising that in the model here presented, opinion makers are positioned only *after* personal sources.

Picture 3.1 – Hierarchy of responsiveness to purchase information sources



Source: Adapted from Jolson & Bushman (1978)

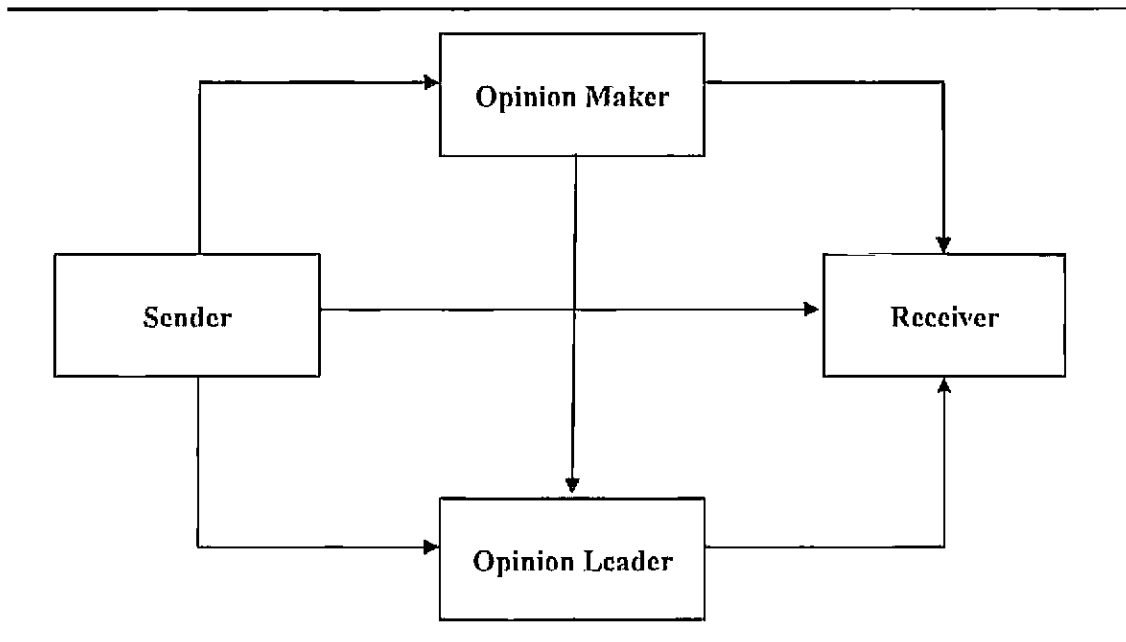
It must however be noted that the opinions of personal sources may reflect those of opinion makers. A basic finding in opinion leadership research is that opinion leaders are more interested and involved in the field in which they are influential than their acquaintances, and tend to be more exposed to the media in order to maintain updated their knowledge, since they are well aware that they serve as sources of information and influence for others (Katz, 1957; Weimann, 2001; see also par. 1.4.4). Marketing studies have found that opinion leaders tend to be more exposed to specific media that vehicle opinion maker information. Research has supported this contention in a variety of contexts, e.g., coffee (Arndt, 1968), cultural activities (Langeard, Crousillat & Weisz, 1977), wine (Chaney, 2001), cosmetics (Coulter, Feick & Price, 2002), women's clothing fashion (Vermette, 2004).

Evans & Fill (2000) were among those more explicit in proposing an unitary view of the patterns of mutual influence between marketer-dominated, expert and personal sources of information about products and services. Put differently, these authors modify Lazarsfeld, Berelson & Gaudet's (1944) well-known two-step flow of communication model to also include opinion makers<sup>2</sup>, whose influence over consumers is felt both directly and indirectly through opinion leaders. This way of articulating sources of influence over consumers reminds of the distinction proposed by sociologists of diffusion between 'external' and 'internal' source of influence over the adoption of innovations (see par. 1.4.4). Opinion makers and marketers may be considered external sources fostering the diffusion *into* a population of adopters, while opinion leadership and words-of-mouth phenomena foster social contagion and diffusion *within* a population. Thus, both 'supply-side' and 'demand-side' patterns of influence may co-exist.

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<sup>2</sup> More precisely, the authors refer to "opinion formers" rather than to "opinion makers", and interpret the expression in a broader sense, to include also public officials and celebrities.

Picture 3.2 – Multi-step flows of communication model

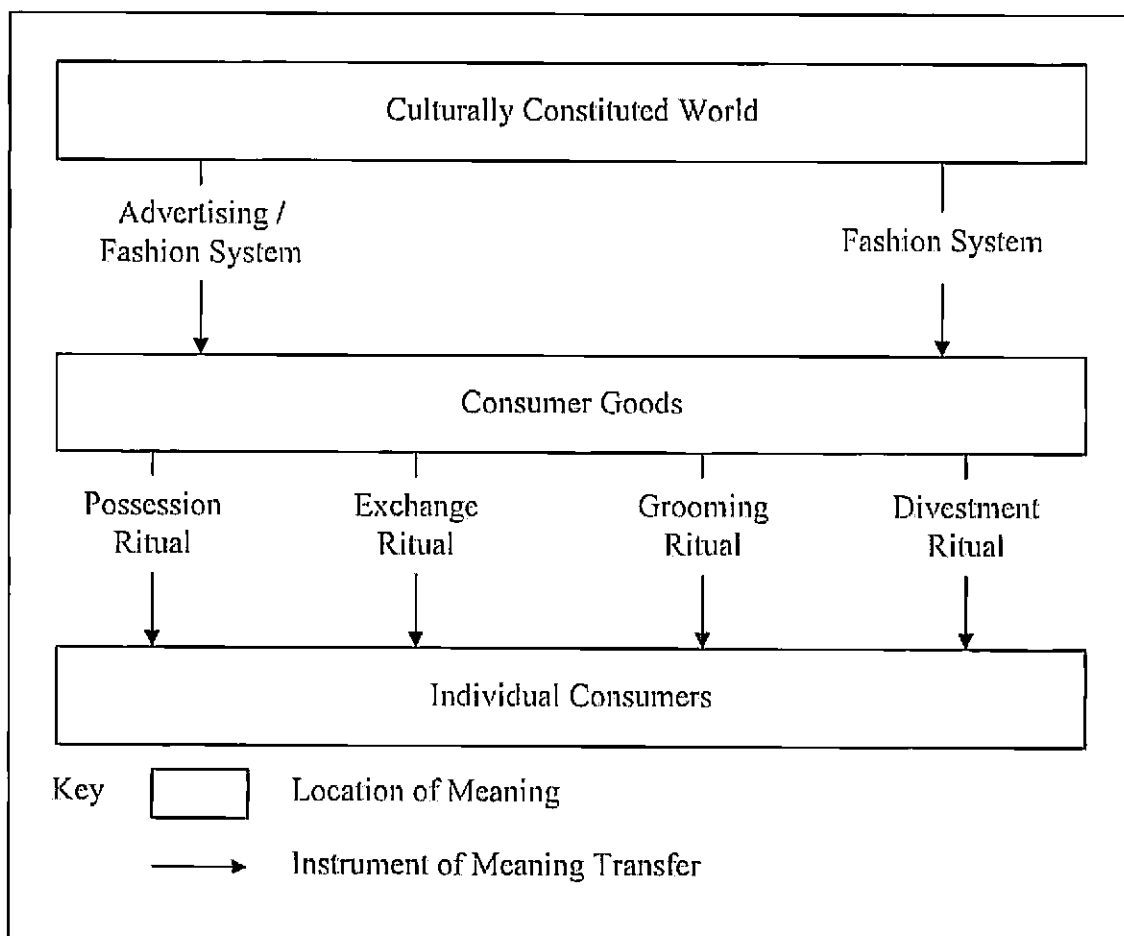


Source: Adapted from Evans & Fill (2000).

Although the view of opinion makers as expert sources of information is prevalent in marketing, a notable exception exists, as reminded of at the beginning of the present section. McCracken (1986) draws on cultural anthropology to propose an unifying model of the processes through which: (i) business companies transfer “cultural meanings” to the goods and services they produce; (ii) consumers appropriate such meanings. By doing so, he also attributes opinion makers a key role in such processes. More specifically, according to McCracken, meaning “is constantly in transit” and “flows continually between its several locations in the social world” (McCracken, 1986), as shown in Picture 3.3. Much of the meaning of goods can be traced back to the categories into which a culture segments the world and the principles behind such categories. Consumer goods, in other words, are cultural artifacts that embody and reveal the cultural categories and the principles that act as the lens through which the phenomenological world is seen by members of a society. For example, dresses are revealing of the culture-based differences attributed to members of a specific gender, age group, social class with respect to the others. Meaning, that first resides in the culturally constituted world, is transferred to goods in different ways, among which

prominent manners are advertising and product design as practices in the fashion system. Advertising (and other promotional activities, as branding) is a powerful way to transfer meaning to consumer goods that, in this manner, acquire specific signifying capabilities for target groups. Of more interest here, the fashion system also serves as a means by which goods are systematically invested and divested of meaningful properties. Finally, the meaning resident in consumer goods is moved from the consumer good into the life of the consumer through various typologies of rituals thanks to which consumers appropriate the meaningful properties of goods.

Picture 3.3 – Movement of meaning in consumer societies



Source: Adapted from McCracken (1986).

McCracken (1986) attributes to opinion makers a key role as agents in the gathering and transferring of the cultural meaning of consumer goods. The fashion

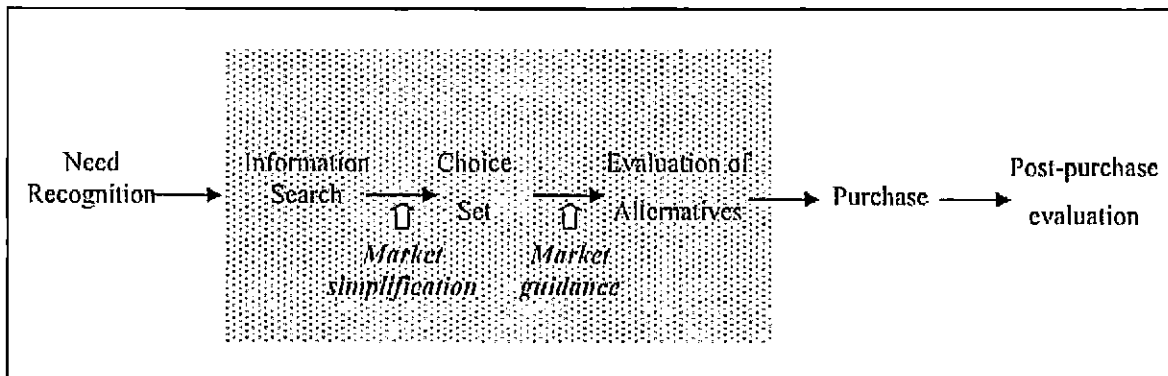
system, in fact, has three distinct ways of transferring meaning to goods within the fashion system. The sources of cultural meaning in society are dynamic and numerous: business organizations, celebrities, subcultures of consumptions at the margins of society. Opinion makers as fashion journalists and social observers that diffuse their opinions through the media serve as gatekeepers, since they “review aesthetic, social, and cultural innovations as these first appear and then classify the innovations as either important or trivial” (McCracken, 1986: 77). Put differently, they decide what is ephemeral and what will endure. By disseminating their opinions through the media, these opinion makers have a very important role because they make their influence felt even before an innovation passes to its “early adopters” (Baumgartern, 1975; Meyersohn & Kats, 1957; Polegato & Wall, 1980). Product designers draw on opinion makers’ views on innovations when they invest cultural meanings in the goods they design. And once these goods are launched, opinion makers intervene again, by informing consumers about the cultural significance of the physical categories of consumer goods. Put differently, “the designer relies on the journalist at the beginning and then again at the very end of the meaning transfer process” (McCracken, 1986: 77). In spite of the significance of this view, that has been influential in explaining the function of celebrity endorsers (see Appendix 3.2), so far it has not originated empirical studies of opinion makers among marketing scholars, that tended instead to focus on the role of opinion makers in the consumer decision-making process, as better explained in the section that follows.

### *3.1.2. Simplifying markets and providing guidance: The role of opinion makers in consumer decision-making processes*

Under a consumer information processing perspective, a possible way to conceptualize the role of external experts is to analyze the manners they may intervene at specific phases of the consumer decision-making process. This analytical strategy was employed by Salomon (1986) in his broad discussion of all types of external agents (whom he calls “surrogate consumers”) that may help consumers in their purchase

decisions<sup>3</sup>. More specifically, under this perspective, opinion maker functions may be two: simplify the market, in order to reduce to a manageable number the alternatives of offer; and provide guidance to evaluate the selected ones. Consider a stylized model of consumer decision-making process, as the one depicted in Picture 3.4.

**Picture 3.4 - Possible functions of OM in the consumer decision-making process**



*Source:* Adapted from Solomon (1986)

The view proposed by Solomon (1986), which is representative of the way opinion makers are conceived in most marketing studies, suggests that external experts may first intervene in consumer decision-making once they have started their search of information about supply alternatives likely to satisfy their needs. This means that opinion makers intervene only after the information search phase has started and, once a purchase decision is made, their influence is not felt anymore, with the possible exception that the post-purchase satisfaction will permit to evaluate the opinion maker's usefulness as source of information. Here, it is worth noting that most marketing researchers would agree on the fact that the influence of experts extend beyond the central phases of the consumer decision-making process. For example, most consumer researchers would agree that expert opinion diffused through the media may affect need recognition; that product reviews could be read in an extended search of information not

<sup>3</sup> Solomon's (1986) notion of "surrogate consumers" is broader than that of opinion makers. Surrogate consumers include all the agents retained by a consumer to guide, direct, and / or transact marketplace activities. Product reviewers, movie critics and security analysts are considered by the scholars as surrogate consumers; yet, the concept also include professional hired by consumers to help in their decision-making process, e.g., architects, interior designers, tax consultants, personal shoppers, and the like.

motivated by immediate purchase reasons. Yet, empirical and analytical efforts in marketing are concentrated in the central phases of the consumer decision-making process. More in detail, the functions that opinion makers may play for consumers involved in a purchase process are the following (Solomon, 1986).

- *Market simplification.* In most situations, consumers are overwhelmed by purchase alternatives. Different solutions, suppliers, brands, products are available, and differences among them are not immediately perceivable. In these situations, different typologies of opinion makers may help consumer focus their choice over a more limited number of alternatives. Specialized journalists writing in a computer magazines, for example, may suggest that a specific category of hardware and software is “for professional users” and thus redirect consumer search efforts. Reviewers may rank or rate restaurants, hotels, university programs on the basis of global indicators of quality or price, with the consequence that consumer search will be focused to a more limited range of alternatives, i.e., consumers may decide to exclude from their considered set low-ranking alternatives. More upstream, lack of coverage over some purchase alternatives will act as a powerful simplifier of market complexity since, to the extent that the opinion maker is the only source of information employed, excluded alternatives *will not even exist* for consumers. In the previous chapters, several times reference was made to the fact that opinion makers provide a “dirty” or distorted mirror of reality, since their coverage decisions marginalize certain aspects of the world they seek to represent. Opinion maker selectivity was traditionally conceived of as negative, since “excluded” realities are not provided with full access to the media and thus do not participate to the social construction of reality. On the other hand, by focusing on the limits individuals (and specifically consumers) have in their cognitive capability, opinion maker selectivity has to be judged in a more favorable way, at least to the extent that they help to simplify a more complex world and to reduce cognitive efforts.
- *Market guidance.* Once a choice set has been assembled, consumers have to evaluate possible choices in order to decide which one(s) will be purchased. And again, in this phase, they may decide to rely on opinion makers for expert advice. Most product reviews contain a mix of descriptive elements (i.e., information about the product); analytic elements (i.e., insights on how to interpret its significance for a



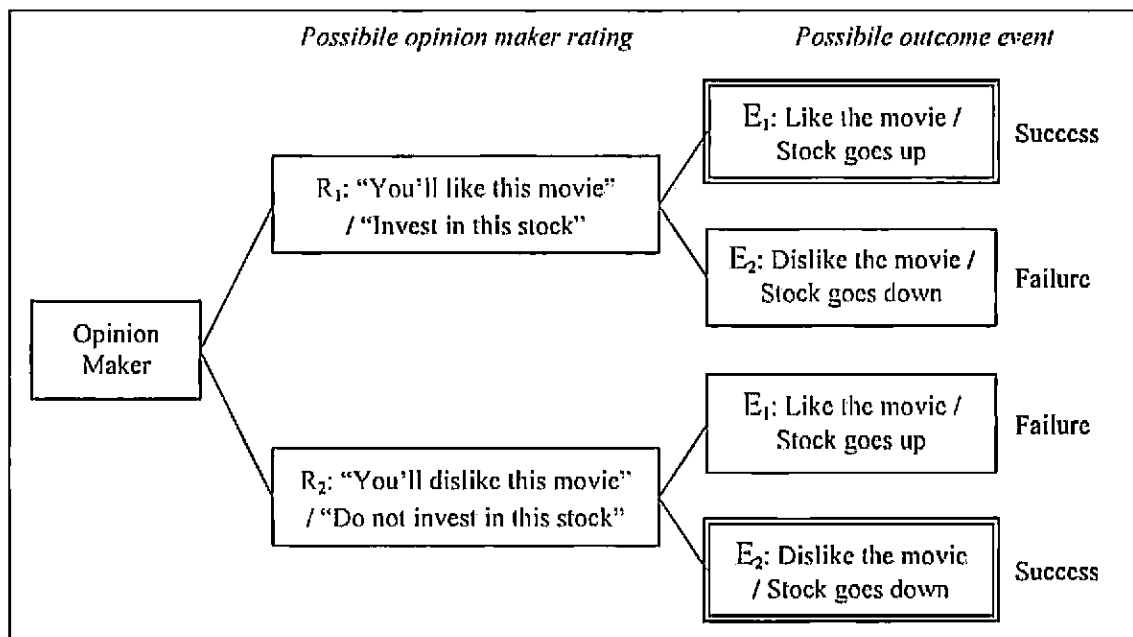
certain consumption decision); and evaluative elements (i.e., positive or negative elements), although in some cases some elements may be avoided. A restaurant critic, for example, may describe the typical dishes to be found at restaurant and the relative quality of food and service; categorize the chef's style as *nouvelle cuisine* or belonging to a regional tradition; and provide a recommendation, both implicitly in a ranking or rating judgment, or explicitly, by recommending to patron the restaurant or avoiding doing so. Similarly, security analysts provide guidance to investors by describing company strategies in the context of the industries where they operate; by interpreting the contribution of industry events and firm strategies to future profits; and by recommending whether to sell, buy, or hold the firm's securities.

Under this conceptualization, managerial implications are evident. Opinion makers are a natural target for marketers, at least to the extent that they are relied on by consumers in their purchase processes. Marketing efforts in this direction should aim at: (i) obtain coverage, to avoid being excluded from consumer choice sets; (ii) obtain a favorable coverage, so that descriptive, analytical and evaluative elements are consistent with product positioning and brand image. The research issues raised by this perspective are no less evident, and include, among others (Solomon, 1986): (i) the selection and evaluation of opinion makers by consumers; (ii) opinion makers' decision processes. While the latter has not received attention from marketing scholars, a few contribution exist that focus on the former.

With respect to the *selection of opinion makers by consumers*, it must be noted that opinion makers are employed to simplify the decision-making process, yet selecting among different opinion makers may be a rather cognitive-intensive activity. Nowadays, with the Internet, for certain product categories, consumer have available numerous review alternatives, and this abundance may increase, rather than decrease, cognitive efforts. Recent contributions in consumer behavior specified some of the tasks that consumers face when dealing with external sources of information, some of which make sense also in the case of opinion makers. Key tasks include "determining which agent

should provide an evaluation of an alternative under consideration, and making a decision in the face of conflicting agent opinions” (Gershoff, Broniarczyk & West, 2001). Gershoff *et al.* (2001) suggest that the selection of opinion makers in situations where purchase decisions are repeated over periods of time may be based on the accuracy of their past opinions. For example, a consumer may rely more on movie critics that have recommended a movie that the consumer has liked or avoid considering a security analyst whose recommendations have been subsequently proved inaccurate. In terms of the previous Picture 3.4 , this means that the post-purchase evaluation of products and services also provide information about the accuracy of the opinion maker. Thus, when different opinion makers are available, consumers will select the ones that, in past purchases, have suggested to purchase an alternative that the consumer has been satisfied with, or to avoid purchasing an alternative that the consumer has not appreciated, as modeled in Picture 3.5.

Picture 3.5 – Selecting an Opinion Maker for an Evaluation



Source: Adapted from Gershoff, Broniarczyk & West (2001)

Another stressful cognitive task for consumers consist in dealing with diverging expert opinions (Gershoff, Broniarczyk & West, 2001). It is not uncommon that opinion

makers disagree among themselves. While sociological research shows patterns of mutual influence among opinion makers, it was previously noted that opinion makers disagreeing from colleagues in a reasoned way may increase their standing within their occupational community. Yet, consumer research shows that consumers respond negatively to uncertainty and, in some cases, may completely reject an alternative with conflicting opinions or ignore the inconsistent information (Jaccard & Wood, 1988; Meyer, 1981; Ross & Creyer, 1992). In this situation, West & Broniarczyk (1998) suggest that consumers will respond to critic disagreement by discounting the critic opinions and increasing their reliance on product attribute information in their evaluations.

### *3.1.3. Opinion makers' influence over audiences*

Most of the contributions so far reviewed do not focus explicitly on opinion makers, but rather on the more general phenomenon of others' influence over individual consumers' purchase processes. For example, Solomon (1986) provides a theoretical discussion of "surrogate consumers", a concept much broader than that of opinion makers. Similarly, West & Broniarczyk (1999) and Gershoff, Broniarczyk & West (2001) are concerned with the impact of others' opinion over individual decision-making, and typically employ more typologies of opinion makers in their empirical studies in order to generalize findings across product categories. A few empirical studies have however investigated specific categories of opinion makers. Very briefly, these contributions have distinctive features with respect to research questions investigated, research design employed, empirical settings. As shown in Table 3.2, most contributions focus on movie critics and other opinion makers in cultural industries. Further, from a methodological point of view, most of these studies employ experimental designs or econometric analyses of secondary data. Finally, most of these studies are concerned with the use of opinion makers as information sources or their relative impact over product and service success.

Table 3.2 – Marketing literature focusing on specific typologies of opinion makers

Contribution	Empirical Setting	Typology of Opinion Maker	Methodological approach	Issues investigated
Jolson & Bushman (1978)	Catering industry	Food critics	Survey to restaurant-goers, restaurant owners, restaurant critics.	<ul style="list-style-type: none"> <li>• Perceived impact of food criticism;</li> <li>• Ethical considerations</li> </ul>
Leonard-Barton (1985)	Medical technology	Nationally recognized professional experts	Survey to dentists.	<ul style="list-style-type: none"> <li>• Influence over technology adoption</li> </ul>
Eliashberg & Shugan (1997)	Movies	Movie critics	Econometric analysis of secondary data	<ul style="list-style-type: none"> <li>• Influence over box office performance: predictors vs. influencers</li> </ul>
Reddy, Swaminathan & Motley (1998)	Broadway Shows	Theater critics	Econometric analysis of secondary data	<ul style="list-style-type: none"> <li>• Relative influence of critical reviews and other variables over the length of a show's run and its attendance</li> </ul>
Holbrook (1999)	Movies	Movie critics	Econometric analysis of secondary data	<ul style="list-style-type: none"> <li>• Differences among expert and popular judgments of motion pictures</li> </ul>
D'Astous & Touil (1999)	Movies	Movie critics	Experimental design	<ul style="list-style-type: none"> <li>• Conditions that affect the likelihood that consumers' evaluation of new movies follow critic's judgments</li> </ul>
Evans & Fill (2000)	Motor industry	Motor journalists	Qualitative interviews to motor companies and specialized journalists	<ul style="list-style-type: none"> <li>• Motor companies' influence over journalists</li> <li>• Perceived impact of motor journalism;</li> <li>• Ethical considerations</li> </ul>
D'Astous & Colbert (2002)	Movies	Movie critics	Experimental design	<ul style="list-style-type: none"> <li>• Psychological antecedents and consequences of moviegoers' consultation of critical reviews</li> </ul>
D'Astous & Carli (2003)	Movies	Movie critics	Experimental design	<ul style="list-style-type: none"> <li>• National cultural influence over moviegoers' consultation of critical reviews</li> </ul>
Basuroy, Chatterjee & Ravid (2003)	Movies	Movie critics	Econometric analysis of secondary data	<ul style="list-style-type: none"> <li>• Relative influence of critical reviews and other variables over the length of a show's run and attendance</li> </ul>

More specifically, one of the preoccupation of marketing scholars has been that of determining the impact of opinion makers over the success of products and services. Leonard-Barton (1985), in one of the few studies dealing with professional audiences (i.e., dentists), documents the fact that relatively few experts influence the formation of opinion toward – and adoption of – controversial medical technologies, particularly when they are negative towards them. In more recent years, a couple of contributions have employed econometric analyses of secondary data to find evidence of the degree of influence of critics in popular cultural industries. Eliashberg & Shugan (1997), in a widely quoted contribution dealing with movie critics, focused the attention of marketing scholars to the real degree of influence critics and other opinion makers have over the success of products and services.

More precisely, Eliashberg & Shugan (1997) distinguish between two possible role of critics: influencers vs. predictors. According to the former, critics could be regarded as expert sources of information and actually influence moviegoers' decisions. According to the latter, instead, critics could merely represent their audiences: thus, they predict whether their readers or viewers would like the film, but have little influence. The two scholars employ the idea of the hierarchy of information sources employed by consumers (see par. 3.1.1) to suggest that reviewers should have their greatest potential for influence at the release of a movie, since little or no word-of-mouth information is available to consumers. As more people see the film, the relative impact of reviews, they argue, should diminish, because word of mouth becomes more prevalent. To disentangle causality from correlation, Eliashberg & Shugan (1997) estimate the correlation between critics' reviews (positive and negative) and box office performance for each week of movies' life. Their empirical findings suggest a statistically insignificant relationship between critical reviews and box office revenues during the first four weeks following the review; however, as the time passes, such relationship becomes statistically significant. Thus, they conclude, patterns in their data support a view of critics as predictors rather than influencers.

While influential for his role in reviving the debate over the role of opinion makers in marketing, Eliashberg & Shugan's (1997) results were possibly biased by the fact that their empirical model did not consider control variables likely to affect movies' box office performance. Later contributions tried to shed light on the issue by employing more articulated research designs. Basuroy, Chatterjee & Ravid (2003) employed a research design similar to that of Eliashberg & Shugan (1997), in order to compare their results, yet improved with the inclusion of star power and production budget as control variables. Their findings diverge from Eliashberg & Shugan (1997), since a positive correlation between critical reviews and box office performance is found to exist starting from the first weeks after a movie is released. Moreover, they find that negative reviews hurt performance more than positive reviews help it. And finally, they discover that popular stars and big budget may enhance box office revenue for films that receive negative reviews, but may do little for films that received positive reviews. Thus, they may act as a sort of "insurance policy" against the risk of critics disliking the film. Similarly, Reddy, Swaminathan & Motley (1998), in their investigation of the determinants of Broadway shows' length of run and attendance, found that theatre critics are influencers, and not only predictors, of success. Moreover, these scholars found that advertising expenditures also affect show success, and that the degree of influence of different critics varies. For example, the theater critic for the *New York Times* was almost twice as influential as those from the *New York Post* and *Daily News*. These differentiated patterns of influence lend support to the idea of hierarchies of influence among opinion makers also in this empirical setting.

Other studies have investigated the influence of opinion makers over individual consumers (rather than their aggregate effect) through experimental research. Most prominent, here, is the work of d'Astous and colleagues, that conducted different studies focusing on the influence of movie critics over single moviegoers. d'Astous & Touil (1999) employ attribution theory (Kelley, 1967; see also par. 1.2) to suggest that moviegoers, when presented with critics' opinions, react in manners that depend on their causal analysis of the reasons behind those opinions. They found that consumers' evaluations of a new movie are more likely to follow the judgment of a film critic when this judgment does not conform to the critic's style; when the judgment is inconsistent

with the critic's predisposition toward the film director, and when other critics' judgments show favorable consensus. More recently, d'Astous & Colbert (2002) have investigated the psychological antecedents of the extent of consultation of film reviews, finding positively link to moviegoers' knowledge about cinema, susceptibility to social influence, and negatively correlated with their self-esteem and involvement in cinema. Subsequently, d'Astous & Carù (2003) employed Hofstede's (1983) framework to predict differences among moviegoers of different nationalities on the basis of their cultural differences. As a whole, these studies contributes to our understanding of how individual consumers employ the opinions of third-party mass media expert in their decision making process in the specific case of movie critics, and as such are complementary to more general consumer behavior studies (e.g., West & Broniarczyk, 1998; Gershoff, Broniarczyk & West, 2001).

In some cases, empirical contributions have tried to directly investigating opinion makers and influenced companies' perceptions over issues of interest. Put differently, these studies employ a "supply-side" approach that complements the "demand-side" approach of the contributions so far reviewed. Jolson & Bushman (1978), in what is perhaps the first marketing study on opinion makers, employ three separate surveys of restaurant-goers, restaurant owners and food critics for major US newspapers to triangulate perceptions over the impact of the restaurant critique system on consumer choice and other related issues. Notably, their research findings show that both restaurateurs and critics overestimate the impact of critic influence (at least, when compared with restaurant-goers' perceptions). Further, the study reports several critiques of the restaurant critique system, including the possible unethical conduct of critics or restaurant owners. Similarly, Evans & Fill (2000) employ a qualitative research design, based on semi-structured interviews, to examine motor companies relationship with specialized journalists. Being easily identifiable, motor journalists are preferred target for motor companies' communication efforts and, as a consequence, ethical and objectivity issues emerge.

### *3.1.3. Opinion makers and marketing communications*

Expertise, as a major determinant of credibility, is a major route to persuasion, since it leads to internalization of opinion. Marketers have three major strategies available to exploit expertise in their promotional activities: (i) to employ spokespersons that appear to be expert in their promotional messages; (ii) to employ expert third-party endorsers in their promotional messages; (iii) to influence third-party sources of information in order to appear in a favorable way. The first strategy is the most researched in marketing and advertising communication, and the second has recently attracted some attention. The last strategy, arguably the most effective, has attracted more attention in the context of (critical) media studies than in the marketing or public relations field.

Marketing scholars have long investigated advertising as a source of influence over consumers, and the ways to improve its effectiveness. Since advertising is a marketer-dominated source of information, those exposed to its messages will consider it less credible than, say, personal sources or independent third-party sources. Advertiser have developed several strategies to deal with this major limit to the effectiveness of their messages, including among others the use of spokesperson and endorsers. Experts are just one of the possible alternatives. More specifically, marketing researchers have tried to understand the social influence mechanisms underlying the effectiveness of the different typologies of source, and the circumstances under which one is more effective than the others. Social psychological research on source attributes leading to persuasion (see par. 1.2) was a natural starting point for most of studies in this stream of research<sup>4</sup>. From a methodological point of view, reference to social psychology implied the use of experimental research designs, where source attributes could be easily manipulated and linked to various outcomes of interest for marketers

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<sup>4</sup> Social psychologists have discussed power, attractiveness and credibility as source attributes leading to social influence. Of the three, marketing scholars have focused on attractiveness and credibility only. Because of the voluntary nature of market transactions, power and the corresponding social influence mechanism of compliance have been neglected.



(e.g. attention to the ad, attitude toward the ad, attitude toward the brand, purchase intention)<sup>5</sup>.

Early research has initially identified four figures of endorsers (Fireworker & Friedman, 1977; Frieden, 1984; Friedman & Friedman, 1979; Joseph, 1982): the “decorative” model; the celebrity; the expert; and the typical consumer. A more recent line of enquiry (Dean, 1999; Dean & Biswas, 2001; Peterson, Wilson & Brown, 1992) has instead investigated the role of employing neutral third party endorsement of products in advertising (e.g. a movie trailer reporting favorable comments by a movie critic). Table 3.3 shows these endorser typologies and the social influence mechanism(s) that have been employed to explain their effectiveness as sources. The focus of this paragraph is on experts and third-party endorsers; see Appendixes 3.1 and 3.2 for a brief review of the other typologies of advertising spokespersons.

Research in marketing-related literature has generally supported the claim that credible sources in advertising are influential in persuading consumers (e.g. Harmon & Coney, 1982; Moore, Hausknecht & Thamodaran, 1988) and in influencing attitudes (e.g. Craig & McCann, 1978). More specifically, expert spokespersons were found more effective than other typologies of endorsers in the case of products characterized by financial, performance, or physical risk (Friedman & Friedman, 1979). Further, in an investigation focusing on the differential impact of endorser gender, Freiden’s (1984) findings provided a partial support for the fact that male endorsers tend to outperform female endorsers on some criteria (e.g., ad information value; spokesperson knowledgeableness). Similarly to what happens in the discipline of social psychology, upon which all research on source effects in advertising and consumer behavior is grounded, the existence of source effects is now taken for granted, and researchers are now investigating conditions that may affect or interact with source credibility in order to determine overall persuasiveness. For example, Harmon & Coney (1982) employed

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<sup>5</sup> Some contributions have also examined source credibility/attractiveness in sales context (e.g. Busch & Wilson, 1976; Ronkainen & Reingen, 1979; Simpson & Kahler, 1980; Woodside & Davenport, 1974). This area of enquiry has however received a more limited attention, arguably because “extensive research in social psychology has been seen as generalizable to personal selling situations” (Sharma, 1990). Discussion of such literature is beyond the purpose of the present review.

cognitive response theory to suggest that when people oppose a message advocacy, a high credible source (who inhibits counterargumentation) induces greater persuasion than a less credible source; on the other hand, when message recipients favor the position advocated by a message, a highly credible source inhibits the activation of support arguments and thus less credible sources tend to be more persuasive.

**Table 3.3 – Endorsers typologies investigated in marketing literature**

<b>Endorser typology</b>	<b>Bases of persuasion</b>	<b>Exemplificative studies</b>
<b>Typical consumer</b>	<i>Source similarity</i>	Friedman & Friedman (1979); Swartz (1984)
<b>“Decorative” model</b>	<i>Physical attractiveness</i>	Chestnut, Lachance & Lubitz (1977) Joseph (1982); Caballero & Solomon (1984); Bower (2001)
<b>Celebrity endorser</b>	<i>Source attractiveness</i>	Friedman & Friedman (1979); Atkin & Block (1983);
	<i>Source expertise/experience</i>	Kahle & Homer (1985); McCracken (1989); Kamins (1989); Misra & Beatty (1990); Kamins (1990); Ohanian (1991); Solomon <i>et al.</i> (1992); Erdogan (1999);
	<i>Match-up between celebrity and product</i>	Goldsmith, Lafferty & Newell (2000)
	<i>Meaning transfer</i>	
<b>Expert</b>	<i>Source expertise</i>	Dholakia & Sternthal (1977) Friedman & Friedman (1979)
<b>Third-Party Expert endorser</b>	<i>Source expertise</i> <i>Source trustworthiness</i>	Peterson, Wilson & Brown (1992); Dean (1999); Dean & Biswas (2001)

In the context of advertising and other forms of promotional communication, however, an important limit to persuasion is consumer perception that expertise and trustworthiness may be at odd. According to attribution theory (Kelley, 1967; see par. 1.2), consumers who are exposed to an advertisements act as naïve scientists in attempting to assess whether the message provides an accurate representation and/or

whether the source of the message lacks credibility. Folkes (1988), in this sense, suggests that “[w]hen a product endorser has external reasons to account for favorable comments about a product, recipients of the communication often believe the product less worthy than when endorsement involves minimal or no external incentive”. The so called “discount principle” is empirically supported. Thus, for example, when Frank Sinatra endorsement of Chrysler cars was identified as being compensated at the rate of US\$ 1,00 per year, consumers evaluated such cars more favorably than when no rate of pay was specified (Sparkman, 1982).

The possible discounting of otherwise credible endorser messages has led research to identify strategies useful to preserve overall advertising effectiveness. One approach, in this sense, consists in the use of “two-sided ads”, i.e. the disclosure of less-than-positive information about the product. For example, an ice-cream producer could design an ad message suggesting that its products have both rich, exquisite taste *and* high calorie content (Pechmann, 1992). Two-sided ads tend to be viewed as more credible than one-sided ads (Kamins & Assael, 1987; Pechmann, 1992; Smith & Hunt, 1978; Swinyard, 1981) because they leverage on the trustworthiness dimension of credibility. As shown in picture 3.6, since the disclosing negative information on secondary product attributes may result in lost sales, consumer may infer that the source is exceptionally honest, increasing as a consequence the credibility of the message regarding primary attributes and thus overall product evaluations (Pechmann, 1992).

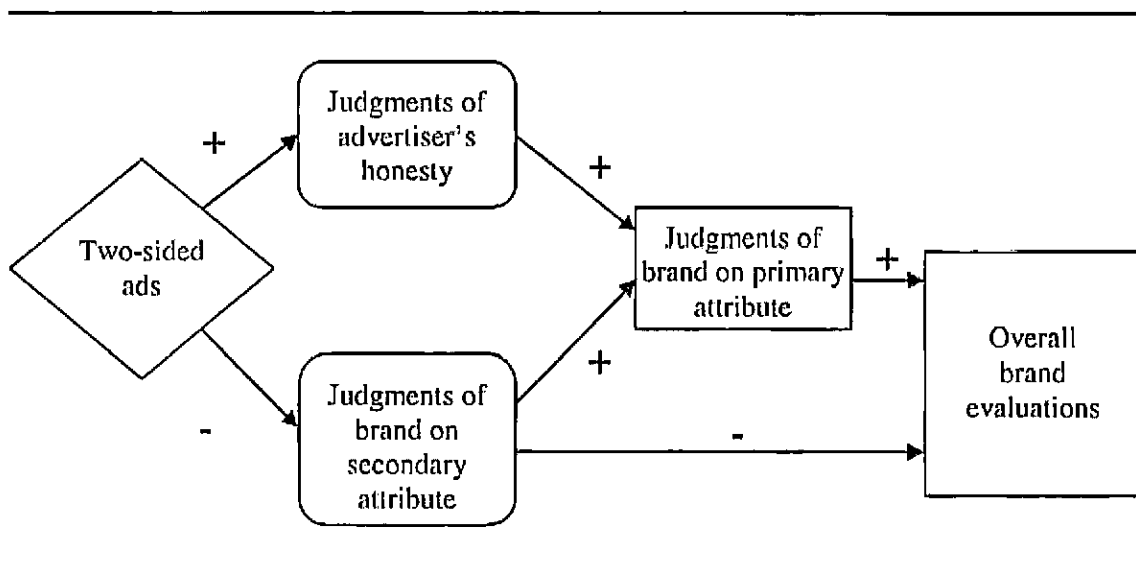
A second communication strategy useful to increase the perception of trustworthiness and credibility is the use of third-party endorsements. In these cases, the advertisement incorporates a positive evaluation of the advertised product that is attributed to a (supposed neutral) third-party<sup>6</sup>. Third-party endorsements may occur may take one of these general forms (Dean & Biswas, 2001).

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<sup>6</sup> This communication strategy is employed also in the contexts of product packaging. In this context, however, almost no empirical research exist, an exception being Larceneux (2001), that investigates labels containing critical opinion in the case of cultural products (music CDs).

- The product is ranked against competing products in its class on one or more criteria. This is the case, for example, of a University stating in its advertisements the position of its MBA in the ranking issued by the Financial Times.
- The product is awarded a “seal” of approval by the endorser, as in the case of an ad for Norton Antivirus incorporating a seal of approval from Windows Magazine. Seals of approval usually attract viewer attention, although the information conveyed is somewhat ambiguous (i.e., how does the product compare with other alternatives in the same product class?).
- A subjective, non comparative statement is made about one or more product attributes. This is for example the case of movie critic quotations (e.g., “A magnificent film”) within film advertisement. This form of endorsement, although less visually striking (it contains only text), may be more flexible, since it permits to address specific product attributes.

Picture 3.6 – Effects of two-sided ads



Source: Adapted from Pechmann (1992).

The third-party endorser is not necessarily an expert: a 'real' typical consumer (as opposed to a model acting as a typical consumer) may be employed in order to exploit also in this context source similarity effects on persuasion. Distinguishing a real consumer from an actor is not however easy for audiences, and any claim about the authenticity of the consumer status of the source may be discounted. Not surprisingly, then, the empirical literature regarding third-party endorsements has focused on experts rather than typical consumers. Moreover, most empirical research has focused on organizations rather than individual experts. On this, Dean & Biswas (2001) argue that since many third-party organizations "analyze and review products as part of their ongoing business and publish their results in consumer magazines" and, in some cases "are nonprofit", most consumers would likely consider them as more neutral and trustworthy than individual experts, who could be believed to receive direct compensation for their endorsement. Furthermore, organizations (as opposed to individuals) could be perceived to have greater access to testing facilities, equipment and information and to have more experts in their staff, implying a greater reliability over the product endorsement decision process (at least in the case of some product categories). As shown in Table 3.4, a limited empirical research exists on this issue.

Two studies investigated (with mixed results) the effect of product ranking endorsements in advertising. Peterson, Wilson & Brown (1992) considered the effect across six different product categories of an endorsement by a fictional market research company, stating that a fictional brand had been rated number one in customer satisfaction according to survey results. Research findings did not however find any effect over purchase intention or attitudes toward the ad, brand, and company with respect to the unendorsed brands. More recently, Dean & Biswas (2001) compared the persuasive effects of advertisements contained product endorsement by Consumer Digest magazine in the case of a product (desktop computer) and a service (auto insurance): in both cases, they found that ad information value and perceived product quality was significantly greater than in the cases of a celebrity endorsement and no endorsement at all. The authors concluded that in the case of products high in financial risk and low in psychological risks, expert endorsement leads to better results than

celebrity endorsement; celebrities may serve as effective endorsers in the case of product with high social/psychological risk and low financial/performance risk.

**Table 3.4 – Research on third-party endorsement in business communication**

Type of endorsement	Contribution	Endorser	Endorsement	Results
Product rankings	Peterson, Wilson & Brown, 1992	Fictional Market Research Company	N. 1 in customer satisfaction according to survey results	No differences between endorsed / unendorsed brands
	Dean & Biswas, 2001	Consumer Digest Magazine	Rated #1 in overall performance (PC) / in claims satisfaction (auto insurance)	Endorsement affects ad information value and perceived product quality
Seals of approval	Dean, 1999	Consumer Report Magazine	“Best Buy” Seal	Endorsement resulted in enhancement in product quality perceptions, product uniqueness, manufacturer esteem
	Larceneux, 2001	Four Cultural Magazines	Endorsing Labels (different for each of the magazines)	Sales of CDs correlated with the presence <i>and</i> number of endorsements
Subjective statements	Vézina, 1997	Movie critic	Critics’ quote in advertising messages for movies	The number of quotes did not significantly impact on viewers’ intentions

Another two studies investigated instead the effect of “seal of approval” endorsements. Dean (1999) studied the effect of “Best Buy” endorsement from Consumer Report Magazine on respondent pre-purchase perceptions of product quality, product uniqueness, manufacturer esteem, and corporate citizenship: with the exception of the latter, perception of all variable was enhanced in the case of endorsement. Larceneux (2001) investigated instead the role of endorsement by cultural magazines in the context of classical music CDs: unlike the other studies here reviewed, the author investigated the use of endorsement by four different French cultural magazines in the

context of labels (i.e. stamp, stickers or other indicator) affixed to product packaging. Results showed that: (i) the presence *and* number of endorsing labels significantly affected sales (i.e., “the more numerous the stickers, the greater the sales”); (ii) one of the labels had a significantly greater impact than the other three, supporting the idea of a hierarchy of credibility in expert endorsers. Finally, research on “subjective statements” has so far regarded only movies, where critics’ quotes in advertising are widely employed (Baumann, 2002). Vézina (1997) studied the impact of one subjective statement (e.g., “Terrific! Everyone should see this movie!”) on viewer’s intentions to see the movie. He found that the number of quotes did not significantly impact on consumers’ desire to see the film.

To recap, scholarship dealing with third-party endorsement effects in marketing communications is still limited but supports the idea that expert (i.e., opinion maker) statements may be employed in order to produce greater message persuasiveness. On this, more research is however needed: we do not know, for example, under which conditions the three forms of endorsements are most effective; the impact of “subjective statement” endorsements; the possible effects deriving from the interaction between product type and endorsement form. From a social psychological perspective, we can however conclude that third-party endorsement is the extreme frontier in trustworthiness reachable in the context of advertising: being a source controlled by the company, diffident consumers will always have suspects of reporting bias (e.g., negative opinion by experts will arguably not be reported in advertisements). The only possibility to go beyond such frontier would be that of having experts publicly endorse a product/brand in the context of non-advertising communication, i.e., in the media. A few studies have addressed the issue. Evans & Fill (2000), as previously noted, investigated the public relations efforts addressing specialized journalists in the context of the UK motor market, highlighting to a certain extent the threats to journalist objectivity. In the case of movie critics, both Eliashberg & Shugan (1997) and Basuroy, Chatterjee & Ravid (2003), in the discussion of the managerial implications of their findings (see the previous section), suggest strategies to deal with critics: for example, to avoid or postpone previews for critics when negative reviews are anticipated. In

marketing and advertising scholarship, however, strategies of this kind are under-researched and rarely referred to.

Public relations research is more direct in addressing this issue. After all, “[p]ublic relation practitioners have the ability to assist the production of mass media content through various proactive public relation strategies that are designed to promote and present the organization they represent in the most positive manner” (Fortunato, 2000). From a methodological point of view, PR studies typically are designed around a comparison between the content of the press releases a given organization provides the media, and the resulting news stories. As a whole, one basic result of many contributions in this perspective (e.g., Anderson, 2001; Cameron, Sallot & Curtin, 1997; Curtin, 1998; Glascock, 2000; Pincus, Rimmer, Rayfield & Cropp, 1993; Turk, 1986) is that attempts at influencing media content encounter a limit in the fact that journalists prefer information sources over business issues that are perceived as having no obvious self-serving economic purposes (e.g. government agencies, non profit organizations, universities). PR efforts seem however to have an impact, if not on the content, at least on the *amount* of coverage a given issue is given by the media. While this research typically deals with general or specialized journalists, in other cases other scholarship typologies of opinion makers are explicitly referred to, e.g. security analysts in the case of the specialized literature on investor relations (see par. 2.2.3); or “technical experts” that may be “assisted” in their role as media sources (Gay & Heath, 1995).

Overall, the picture that emerges from such studies is that public relations do not threaten to the notion of objectivity. This view appears however in contrast with that proposed by critical media scholars, that attribute to public relations a more powerful effect (see par. 1.4.4). Arguably, the line that separates legitimate influence over journalists and experts over behaviors more questionable on ethical grounds is blurred and discourages empirical research, as is evident in the case of medical researchers, whose involvement in pharmaceutical marketing initiatives is more debated inside the medical profession rather than in industry-related research (see paragraphs 2.2.2-3).



### 3.2. *A critical assessment of OM marketing research*

As noted at the beginning of the present chapter, the knowledge on opinion makers developed by marketing scholars is both insightful and limited. As shown in the previous paragraph, marketing scholarship has so far provided some unique contributions in explaining: (i) the conditions under which a demand for expert opinion emerges in the context of purchase process; (ii) the position of opinion makers in the hierarchy of information sources and the patterns of influence between opinion makers and opinion leaders; (iii) the role played by opinion makers in the consumer's search for information (i.e., market simplification and guidance); (iv) the impact of opinion makers on individual consumers' decision processes; (v) the strategies companies have available to influence opinion makers. Yet, this knowledge is at the same time limited, and for different reasons that appear evident when contrasting marketing scholarship with the different disciplines and bodies of knowledge that have investigated expertise and specific typologies of opinion makers, as proposed in Table 3.5.

With respect to *views of opinion makers*, the review conducted in the previous paragraph shows that in marketing, opinion makers are mostly conceived as expert sources of information about products and services, likely to influence consumers only after they have started their purchase process. Yet, this view contrasts with a number of theoretical perspectives that attribute to opinion makers a much broader influence, that is felt by society as a whole, by organizations in different areas of activities, and by individuals much before a purchase process has started. Thus, for example, critical media scholars suggest that sports and fashion reporting may affect the social reproduction of gender biases and even appearance standards; sociological studies show that expert theorization may restrict the identities available to organizations or foster their adoption of legitimate organizational structures and practices; sociologists of science propose that medical experts may construct markets for new medicines, by medicalizing lifestyle conditions and stimulating consumer interest, much before it is launched in the market. In marketing, McCracken (1986) is among the few that propose a view of opinion makers not restricted to influence over single purchase process, when he proposes that their selection of aesthetic, social, and cultural innovations inspire

designers and companies that, in this way, reduce the risk of launching new products that will not fit with consumer sensibilities. Yet, this cultural perspective, so far, has not produced empirical contributions dealing opinion makers.

With respect to the *typologies of opinion makers* investigated, marketing research has almost exclusively focused on critics, whereas other typologies of opinion makers (*ad hoc* experts relied upon by the media to shed light over issues of the day or specialized journalists), that have been thoroughly investigated by other disciplines, have received a very limited attention (i.e., Evans & Fill, 2000, in the case of motor journalists; Leonard-Barton, 1985, in the case of medical experts). Moreover, with respect to *empirical settings*, as also shown by the quotations at the beginning of the present chapters, many marketing scholars have noted the pervasiveness of opinion makers across product categories, yet motion pictures have received a disproportionate attention, that contrasts with the lack of research in other contexts. The factors that may account for this heightened attention to movie critics include: (i) the availability of detailed secondary data for both box office performance of individual motion pictures and amount and tenor of critical reviews, that enabled econometric modeling; (ii) the proximity of the research questions investigated with those, developed in the context of “highbrow” context, by cultural economists and sociologists of the arts and literature, that enable marketing scholars to discuss their research questions against the framework of a significant theoretical and methodological reflection.

The lack of research regarding other typologies of opinion makers appears however surprising, since consumer behaviorists have long highlighted the conditions under which a demand of expert advice will likely emerge (i.e., *inter alia*, high perceived risk, new products, products with image-related attributes, experience/experiential products). Although other disciplines and bodies of knowledge have investigated specific typologies of opinion makers and produced findings that, as a whole, are of interest for marketers, in most cases research questions and theoretical backgrounds are either uninterested to marketing implications or even critical of business practices. Thus, for example, research developed on the intersection between medical expertise and pharmaceutical marketing tend to be very critical about the latter.

Table 3.4 – Opinion makers: contrasting Marketing scholarship with other disciplines and bodies of knowledge

	Marketing Scholarship	Other disciplines / bodies of knowledge
<i>Views of Opinion Makers</i>	Mostly, expert sources of information that affect consumers after a purchase process has started	Actors that participate in the social construction of reality, with broad influence over society and organizations, which may be felt much before a product is launched
<i>Typologies investigated</i>	Mostly critics	<ul style="list-style-type: none"> <li>• <i>Ad hoc</i> experts relied upon by the media</li> <li>• Critics and other regular media contributors;</li> <li>• Specialized journalists</li> </ul>
<i>Empirical Settings</i>	Mostly motion pictures and other cultural settings. Yet consumer behavior research shows that a demand for expert advice emerges in many other industries and purchase situations	Different, on the basis of theoretical or practical relevance (e.g., security analysts, highbrow arts critics, medical experts, sport commentators, fashion editors)
<i>Research approach</i>	Mostly, demand-side. Researchers have investigated opinion maker influence over consumers, both at the individual and aggregate levels	Both demand- and supply side. Researchers have also investigated determinants of opinion maker attention and favorableness to issues and stories
<i>Methods employed</i>	Mostly quantitative (experiments and econometric modeling of secondary data)	Both qualitative and quantitative. Patterns of disciplinary preferences over methods. Qualitative methods appropriate to investigate the production of expert opinion
<i>Attention to business influence over opinion makers</i>	Seldom referred to.	Very often noted and investigated, particularly by critical scholars

With respect to the *research approach* employed, marketing scholars have mostly employed a “demand-side” perspective, since they have tried to investigate the degree of influence opinion makers have over their audience. As far as *methods* are concerned, this occurred either at the aggregate level, with econometric modeling of secondary data when available, or at the individual consumer level, with experimental research designs. Put differently, opinion makers’ degree of attention and/or favorableness has been modeled as an *independent variable* likely to affect individual consumers’ opinion or, at the aggregate level, product or service success. This approach has correspondence in many disciplines that have employed similar methods (e.g., econometric modeling of the role of highbrow critics in cultural industries and security analysts in financial markets; experiments on determinants of security analysts’ credibility for individual investors).

On the other hand, it is worth observing that marketing scholars (unlike their colleagues in other disciplines) have only marginally adopted a research perspective that could be termed as “supply-side”, aimed to investigate the processes through which expert opinion is reached and the patterns of influence over it. When quantitative, secondary sources were available, this has implied the modeling of critical attention and/or favorableness as a *dependent variable*, and the relative impact of various predictors has been investigated. For example, security analysts tend to pay attention to the securities of more profitable and bigger companies. Literary critics tend to pay attention to book authors “side-line” activities (writing in literary magazines). In other cases, researchers have tried to “open the black box” to explaining how opinion makers reach their decisions, and the inter- and intra-organizational constraints to such decisions. Thus, for example, conflicts of interests and the pressures of advertisers and public relations practitioners have been investigated in the context of security analysts, medical experts, many typologies of specialized journalists. In some cases, this has implied reliance on quantitative methods, because the sometimes ethical sensitiveness of the issues investigated did not permitted more direct approaches. In other cases, instead, qualitative methods, based on extensive field experience, or survey methods when sample size was appropriate, have much contributed to shed light on the characteristics of opinion makers, their working routines within their organizations, the

patterns of status acquisition within their occupational community. The supply-side perspective has however received a very limited attention in marketing scholarship (Jolson & Bushman, 1978; Evans & Fill, 2000), in spite of its relevance. Solomon (1986) were in effect very explicit in address the relevance of investigating opinion makers' decision process because of the role they play for consumers (i.e., market simplification and guidance); yet his suggestions have received a scant attention so far.

Finally, as far as *attention to business influence over opinion makers* is concerned, marketing scholars have so far seldom referred to it. Most prominent is the lack of knowledge on manners to influence opinion makers. Promotional events and press releases are typical ways companies have to influence opinion makers (Evans & Fill, 2000), yet the level of business influence over opinion makers' decisions is often downplayed, even by public relations literature. On the other hand, critical researchers (both in media studies and other disciplines) propose that socio-economical elites, including established companies, may be very powerful in obtaining favorable attention and distract media attention from disliked issues. Changes in the competitive environment of media organizations makes critics and specialized journalists particularly dependent from the information subsidies provided by business organizations. Limits to source access may also be a powerful source of constraint over opinion makers. Advertising budgets may be employed to negotiate favorable editorial content. The desire to avoid critical stances over business practices is perhaps part of the explanation for this lack of research on determinants of opinion makers' attention and favorableness. Yet, supply and demand are two sides of the same coins and it's hard to understand one without the other.

### *3.3. Highlighting directions for future research*

To recap, opinion makers are an important research issue for marketing scholarship, since in many industries, numerous typologies of third-party expert sources of information exist that may influence the market environment where companies operate. Marketing researchers have so far provided a contribution that is unique, yet

limited under different points of view. In particular, efforts to extend marketing knowledge on opinion makers could be in the directions that follow.

- *Adopting a broader view of opinion makers* – Marketing researchers have mostly proposed a view of opinion makers as expert sources of information that intervene in consumer decision-making at specific phases of the purchase process. Yet, their influence may be felt much before. For example, wine critics may influence retailer assortment decisions and, consequently, the variety of products that consumers will find available at points of sales. Expert theorization activities may influence the degree of social legitimacy of new products and services (e.g., acupuncture and massage treatments, herbal remedies, etc.). Opinion makers' expertise may also be interweaved with new product development and launch, as shown by sociologists in the context of new medicine development. Opinion makers may also inspire companies and designers so that their products fit with consumer sensibilities, as proposed by McCracken (1986). In sum, marketing research may benefit from a broader approach aiming to identifying the patterns of reciprocal influences among opinion makers, companies, and other stakeholders.
- *Extending typologies of opinion makers and empirical settings* – Marketing scholarship is concentrated on the investigation of movie critics. Yet, the influence of opinion makers is felt in different industries and situations, including business purchase processes. Marketing scholars should try to analyze other empirical settings and typologies of opinion makers, in order to generalize findings. For example, the debate over the role of movie and theatre critics (i.e., influencers vs. predictors) could greatly benefit from comparisons with findings in other empirical settings. Since however secondary data for product success and opinion maker attention / favorableness are hardly comparable across industries, the most promising direction for generalization of research findings consists perhaps in the experimental method.
- *Also considering the "supply-side" perspective* – Marketing research mostly focuses on "demand-side" research questions, the degree of influence opinion makers have over individual consumers and, at the aggregate level, over the success of products and services. This research emphasis shows that for

companies, it is important that: (i) opinion makers cover their products and services; (ii) their coverage is favorable. In most cases, when many new products are launched at the same time (as in the book publishing and music recording industries), companies cannot advertise them all, and opinion maker attention may be significantly correlated with sales. Yet, research shows that in most cases, opinion maker attention is very concentrated, and most products receive no coverage. Further, opinion makers' messages, that are typically considered more credible than those of advertisers by consumers, may influence very much the way specific products and services are perceived. Even when opinion makers are a target of marketer communication, they may transfer messages in manners much different from those desired. For example, the safety benefits of a new car may be underplayed by motor journalists or, worse, a new book may receive very negative reviews. Finally, research shows that big production or advertising budget may counter the effect of negative reviews; yet those companies that have not emerged yet, typically lack such budgets and are rather dependent from opinion maker attention. Yet, the limits to their attention, coupled with the patterns of influence of established companies, *de facto*, reproduce a hierarchy of accessibility within industries and strategic groups that, as a whole, favors the status quo. These considerations suggests interesting direction for marketing research that could be pursued by research designs employing appropriate methods to "open" the black box of opinion makers' working routines and decision-making processes.

To conclude, opinion makers as a subject of scholarly investigation have been analyzed in different ways by many disciplines and bodies of knowledge with different interests in mind. Very often, these investigations have been conducted with a "watertight" logic by researchers that very seldom have looked at similar issues, research methods, and findings developed by other disciplines. Marketing scholarship, in particular, has been influenced by social psychology in its treatment of source expertise as a determinants of message persuasiveness, by the two-step flow of communication model (that sometimes led researchers to extend the opinion leader concept to those experts diffusing their opinions through the media), and by cultural

economics and sociology of the arts and literature, that at least partly explains researcher attention to movie critics. Other disciplines have however so far not influenced the marketing debate, possibly because of the critical stance towards business practices of some of them (e.g., critical media studies) or the specialized character of some other that did not lend itself to patterns of cross-citation. A contribution of the present review was to reconstruct the fragmented bodies of literature that have analyzed opinion makers and to compare the common themes across them with those pursued by marketing researchers. It was found that in marketing, we know a lot about the manners consumers integrate opinion makers' advice in their research process; yet, we have neglected other aspects that are essential to draw the whole picture and that, hopefully, future research will bridge these gaps in marketing knowledge.



*Appendix 3.1. Source effects for typical consumers and "decorative" models*

As previously suggested (par. 1.2), *attractiveness* was conceptualized by social psychologists as a function of familiarity, likeability, and similarity between the source of a message and its audience (McGuire, 1985). Other research showed that similarity and likeability are the most influential dimensions of attractiveness (Mills & Jellison, 1969). As a consequence, advertising research has mainly investigated the effects of using spokespersons similar to or physically attractive for consumers.

Persuasive effects based on *source similarity* are exploited by advertisements showing "typical consumers" (i.e. consumers belonging to the target group to which the ad is aimed). Friedman & Friedman (1979) proposed that typical consumers are most effective for low-risk products; when a sizeable risk (e.g., psychological, social, financial, personal, or physical) is present, celebrity and expert spokesperson are more effective. As far as the possibility to employ sources that are both similar and expert is concerned, Swartz (1984) expected a trade-off to occur, since, for example "a spokesperson portrayed as the girl next door may be perceived as similar because she is the girl next door. On the other hand, because she is the girl next door, she may not be perceived as an expert. Likewise, if one is presented as an expert, she might be less likely to be perceived as similar, because she is an expert". Results of Swartz's (1984) empirical study, however, did not reveal a relationship between the two typologies of source characteristic<sup>7</sup>.

The issue of communicator *physical attractiveness* has received a much greater attention than source similarity, so far, in advertising literature. Early contributions (e.g. Chestnut, Lachance & Lubitz, 1977; Joseph, 1982; Caballero & Solomon, 1984) were stimulated by studies concerned with portrayal of women in advertising, that content analyzed large samples of US printed advertisements to show an increase in the diffusion of "decorative" (i.e. functionless) or sexually alluring women (Courtney &

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<sup>7</sup> Source similarity has been investigated also in the context of personal selling. A consistent result is that customers tend to be more influenced by salesperson perceived as similar to them (Woodside & Davenport, 1974; Busch & Wilson, 1976).

Lockerets, 1971; Wagner & Banos, 1973; Sexton & Haderman, 1974; Belkaoui & Belkaoui, 1976)<sup>8</sup>. Such studies employed experimental designs in order to determine the effect of physical attractiveness or sexual appeal of models on different types of dependent variables (e.g. attitude to ad, ad recognition brand name recall).

In such studies, physical attractiveness was “usually determined empirically by having a representative panel of “judges” (selected from the population to be eventually study) rate the physical appearance or attractiveness of on or more stimulus persons”; “[s]timulus persons receiving the highest and lowest mean ratings ... [were] then selected to represent high and low levels of physical attractiveness in subsequent experiments” (Joseph, 1982). Empirical support for the assertion that the use of physically attractive models in advertising is effective is somewhat mixed (e.g., Bower, 2001; Caballero, Lumpkin & Madden, 1989; Caballero & Solomon, 1984), and some studies have concluded that a beautiful model may attract audience attraction *but* deviate it from the advertised product or the supporting argumentation (Chestnut, LaChance & Lubnitz, 1977; Reid & Soley, 1983). Further, it has been suggested that women may experience negative affects as a consequence of self-comparison with beautiful female models (e.g., Bower, 2001; Irving, 1990; Martin & Gentry, 1997; Richins, 1991).

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<sup>8</sup> To date, the stereotyping of women and their depiction as sexual object is one of the main critique to advertising moved by critical scholars. See par. 1.4.2 for a review of feminist critiques to women’s magazine.

### *Appendix 3.2. Source effects for celebrity endorsers*

The use of *celebrities*<sup>9</sup> as product endorsers is widespread in advertising and has attracted significant scholarly attention: a recent review (Erdogan, 1999) cites over 45 academic articles dealing with celebrity endorsement in mainstream marketing and communication journals. Celebrity endorsement in advertising may occur in a variety of fashions (McCracken, 1989): explicit (“I endorse this product”), implicit (“I use this product”), imperative (“You should use this product”), and through co-presence (i.e., the celebrity merely appears with the product). Starting from Friedman & Friedman’s (1979) basic advice to employ celebrities for products characterized by high psychological or social risk, a number of studies have examined whether, and under what conditions, celebrity are appropriate endorsers for products (e.g. Agrawal & Kamakura, 1995; Atkin & Block, 1983; Freiden, 1984; Kamins, 1989; Kamins *et al.*, 1989; Ohanian, 1991; Tripp *et al.*, 1994). Credibility and attractiveness are important dimensions explaining why the use celebrity may work in advertising. As far as credibility is concerned, for example, Goldsmith, Lafferty and Newell (2000) found that endorser credibility affects attitudes toward the ad, while Till & Busler (1998) showed that celebrity “expertise” (or more appropriately, experience) with the product to be endorsed has a sizeable effect over attitude toward the brand and purchase intention. Attractiveness, on the other hand, “is an influential factor in the increase use of celebrities as endorser” (Pornitakpan, 2003; see also DeSarbo & Harshman, 1985; Patzer, 1983).

Research on celebrity endorsement has proposed two explicative models besides those based on source credibility and source attractiveness. The *celebrity-product match-up model* (Kahle & Homer, 1985; Kamins, 1990; Lynch & Schuler, 1994; Misra & Beatty, 1990; Solomon *et al.*, 1992) predicts that the use of endorsers in advertising is

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<sup>9</sup> The study of celebrity began “with the rise of mass-produced culture, and in particular with the elaboration of an industrialized Hollywood film ‘star system’ in the early decades of the twentieth century” (Gamson, 2001). According to the Marxist-influenced Frankfurt School, Hollywood stars served as distractions for the masses, and served the support capitalisms’ illusory promises of universal success (i.e., everybody could become a star, so success is available for everybody) (Adorno & Horkheimer, 1977). Present-day cultural critics tend to be more interested to the symbolic activity that takes place in an through celebrity discourse, since “[w]ho gets attention ... tell us much about the core values, or ideological contradictions, of the society giving the attention” (Gamson, 2001; see also Gamson, 1994).

more effective when there is a "fit" (i.e., congruence on some bases) between the endorser and the endorsed product. In this sense, then, the model adds predictive power to the models based on source credibility and/or source attractiveness only: for example, it predicts that physically attractive models should be more effective for products useful to enhance physical attractiveness (e.g., make-up), and conversely that when the product is not related to physical attractiveness (e.g., photocopying machine) the impact of having a beautiful endorser will be minimal. This example derives from the fact that most empirical research has investigated the "goodness-of-fit" between endorser and product on the basis of endorser physical attractiveness. For example, Kahle & Homer (1985) found an increased brand attitude for razor blades when they were paired with an attractive (rather than attractive) endorser; similar results were reported by Kamins (1990), in a study that paired either an unattractive (Telly Savalas) or attractive (Tom Selleck) celebrity with either a product used to enhance one's attractiveness (luxury car) or a product irrelevant to this purpose (home computer). Till & Busler (1998) suggest that other endorser characteristics, such as endorser experience with the product, may lead to a greater "goodness-of-fit".

The *meaning-transfer* model was proposed by McCracken (1989); it suggests that while endorser credibility, endorser attractiveness, and endorser-product matching are "a necessary part of our understanding of the endorsement process", "they do not capture everything at issue in the endorsement process". According to this view, celebrities have symbolic meanings, related to their status, class, gender, age, personality and lifestyle characteristics, which go far beyond their simple attractiveness and/or credibility. The endorsement process is a special instance of the more general process of meaning transfer (McCracken 1986, 1988): meaning begins as something resident in the culturally constituted world and then moves to the consumer goods thanks to advertising and the fashion system; consumers then, by entering in relation with such goods, take possession and appropriate of such meanings. Ads can of course undertake meaning transfer without the help of anonymous models, but "[c]elebrities deliver meanings of extra subtlety, depth and power" that cannot be found in the less expensive, normal models: celebrities draw such meanings from the roles they assume in their careers as movie stars, athletes, etc. Langmeyer & Walker (1991) adopted the

model to show that the singer Cher possessed symbolic meanings that were transferred to an endorsed product (Scandinavia Health Spas); the unendorsed product (bath towels) tended to have more diffuse and undifferentiated symbolic meanings with respect to the more "unique" symbolic properties of the endorsed product.



*Part 2*

*Opinion Maker coverage of fashion products in magazines:  
An Empirical Research*





#### 4. Overview

The purpose of this chapter is to present the research question, setting, and overall design of an empirical study I conducted in order to bridge some of the gaps of marketing literature about opinion makers that were previously highlighted. More precisely, I assume that opinion maker attention and favorableness of judgments matters for companies, and thus I attempt to investigate their determinants. In other words, my empirical study adopts a “supply-side”, rather than “demand-side”, perspective, and intends to document both the working routines of opinion makers and companies’ attempts to influence them. The empirical setting I chose to explore is the fashion industry, where opinion making phenomena are conspicuous, but have not been explored yet by marketing scholars. Here, I intend fashion in a broad sense, i.e., not only apparel but also correlated sectors (underwear and nightwear, accessories, shoes and leather goods, eyewear, glasses, jewelry, watches, and perfumery). The rationale for this is twofold: firstly, all such products have fashion components, in that all share a rapid innovation cycle fueled by style and image elements, rather than by differences in functional features; secondly, a significant number of apparel companies has a diversified range of activities covering more fashion products, either directly or through licensing agreement (Agin, 2000). Moreover, I decided to adopt a wide perspective in order to map the patterns of reciprocal influences among opinion makers, media, companies, and other relevant actors: an approach that has implications in terms of the mix of methods I decided to employ.

The purpose of the present chapter is thus to: (i) describe the empirical setting of the study, i.e., the fashion industry and its opinion makers, because of the implications for the contextualization of research questions and methodological choices; (ii) illustrate the research design; (iii) discuss the results of a preliminary, exploratory study I conducted in order to refine my subsequent analyses.

#### *4.1 – The empirical setting*

##### *a. The fashion industry and its opinion makers*

The theoretical debate on clothing and fashion has a long history, dating back to the intense academic discussions of the nineteenth century. Early fashion theory includes the Freudian analysis of clothes by J.C. Flügel; the pioneering sociological work of H. Spencer, T. Veblen, G. Simmel, A. Kroeber, J. Laver; and R. Barthes' monumental work on the modern fashion system (Carter, 2003). Two sociological models of diffusion have generally been applied to fashion. The classical model is exemplified by Simmel's theory (1904) that new styles are first adopted by upper-class elites and gradually diffuse to the middle and then working class; by the time a particular fashion reaches the latter, the upper class has adopted newer styles, since the previous ones have lost appeal in the process of diffusion. The alternative to this top-down (or trickle-down) model is a bottom-up model in which new styles emerge in lower-status groups and are later adopted by higher-status group (Field, 1970). Subcultures of consumption have distinctive dress styles that attract attention and eventually lead to imitation. Alternatively, new styles emerge from subcultures within middle-class strata, such as artistic and homosexual groups (Polhemus, 1994). Both models assume widespread adoption of a particular fashion and a process of "social saturation" in which the style or fad eventually become overused (Sproles, 1985).

In her review of diffusion models in fashion, Crane (1999) questions the present validity of both models. She argues that "[t]he diffusion of fashion has changed radically in the past thirty years. Originally a highly centralized system in which fashion diffused from a single location [i.e., Paris] to large publics in many locations, it has become decentralized: fashion originates from many sources and diffuses to specific segments of highly fragmented publics" (Crane, 1999: 22). New styles, in other words, will diffuse up or down to certain segment of the population, but will never reach others. Consumers will select styles on the basis of their own identities and lifestyles. Much like McCracken (1986), Crane (1999) suggests that the media prominently

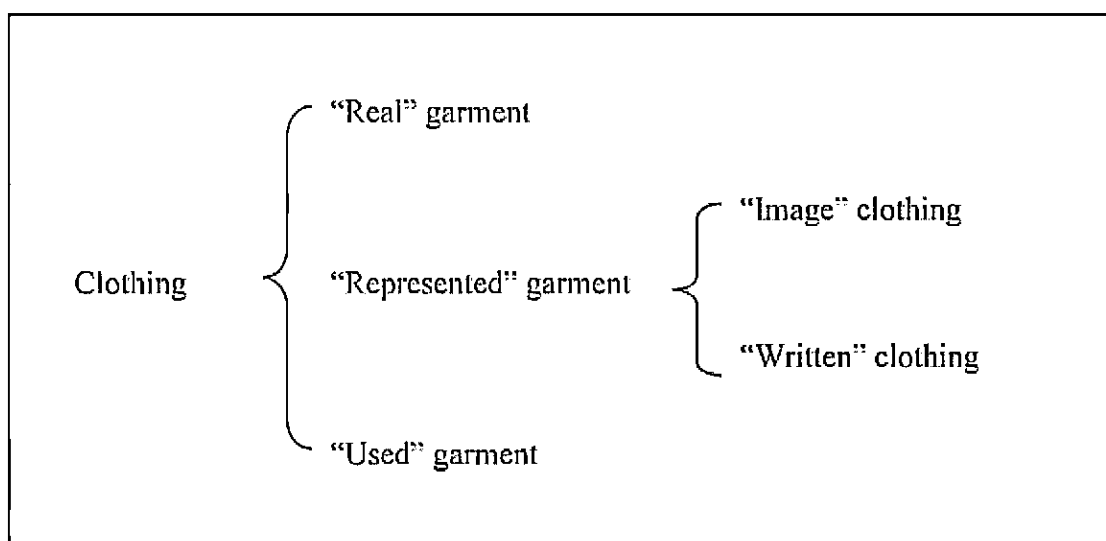
influence both fashion *innovation* and *diffusion*. Designers and clothing companies, in order words, have to stay in touch with trends in popular culture and consumer society; further, among the many styles that are proposed, the media select those that will receive visibility and, thus, will influence those opinion leaders that start social contagion in specific subcultures of consumption. This view resonates with early dress scholar James Laver, when he proposed that the patterns of fashion diffusions are more complicated than assumed by the trickle-down model (that was prevalent at the time): “[i]t all seems very wasteful and almost meaningless, this discarding of old clothes in order to conform to the whim of half a dozen French designers, but the matter is not quite so simple as that. The designers are not their own masters. They can only introduce an innovation if it happens to be in accordance with the spirit of the age” (Laver, 1933: 133). And nowadays, in our postmodern societies, more *zeitgeists* co-exist, each of which influencing specific subcultures. Fashions diffuse accordingly.

In the fashion press, as previously suggested (par. 1.4.2), two categories of opinion makers may be identified: “those who write” (fashion editors), and “those who make images” (fashion stylists). The former may work for both dailies and magazines, while the latter are typically employed by magazines, where they are responsible for styling editorial shoots, working alongside a photographer, to produce an appropriate set of images. Fashion stylists thus have very broad tasks, since ‘styling’ can mean anything (e.g., taking decisions about the models, the hair and make-up artists, the set, the lighting, and the overall attitude of the ‘story’). Both editors and stylists may be conceived as actors “whose occupation is the development of cultural symbols” rather than sources of information about products and services (Hirschman, 1986). This distinction is important, since in the fashion apparel industry, innovation mostly regards style rather than technical features, i.e., it mostly concerns creativity in cuts, colors and relative combinations, patterns, fabrics and their processing and finishing, which when embodied in clothing will satisfy symbolic functions (Cappetta, Cillo, Ponti, 2001; forthcoming; Ravasi, 2004; Rinallo, Golfetto, Gibbert, forthcoming). When embodied in clothing, in other words, stylistic features will allow consumers to express individual identity and signal social status. Opinion makers, because of their expertise, help

consumer identify the cultural significance and signifying ability of new styles, and to “appropriate” their cultural meanings (McCracken, 1985).

This appears to be true both in the case of “written” and “visual” fashion services, each of which has distinctive implications. Perhaps the first to address these issues was Roland Barthes (1983 [1967]), who in his widely quoted *Système de la Mode*, separated clothing into “three garments” (see Picture 4.1). Broadly speaking, the “real garment” correspond to the dimension of production; the “represented garment” to the dimension of, broadly speaking, distribution; the “used garment” to the dimension of consumption. According to Barthes, consumers will never interact with “real” garments, but rather with clothing that have been transformed by the modern system of signification: the “represented” garment that is staged (by advertising, packaging, point-of-sale communication and, more of interest for us, media publicity) to appear attractive to consumers. Of course, “represented garments” will differ from “used garments”: most consumers, after having bought a garment, are prompt to note “the enormity of the gap between how it appears in the photograph and how it looks on us” (Carter, 2003: 147).

Picture 4.1 – The fashion system according to Barthes (1967)



More in detail, according to this perspective, images and words are not neutral vehicles that transmit real garments as they are, unchanged: on the contrary, they

transfer an articulated system of denotations and connotation that provide them with a symbolic *mise en scène*. Barthes further distinguishes between the system of images and the system of languages, by drawing attention to their differences: "I open a fashion magazine; I see that two different garments are being dealt with here. The first is the one presented to me as photographed or drawn – it is image-clothing. The second is the same garment, but described, transformed into language: this dress, photographed on the right, becomes on the left: *a leather belt, with a rose stuck in it, worn above the waist, on a soft Shetland dress*; this is written garment. In principle these two garments refer to the same reality . . . ., and yet they do not have the same structure, because they are not made of the same substances and because consequently, these substances do not have the same relations with each other: in one the substances are forms, lines, surfaces, colors, and the relation is spatial; in the other, the substance is words, and the relation is, if not logical, at least syntactic; the first structure is plastic, the second verbal" (Barthes, 1983 [1967]: 3).

The difference in structure between language and image has implications in terms of the meaning transfer process. Images, on their own, risk to be semantically indeterminate (Rinallo, 2004a,b). The presence of language, on the other hand, constrains reader interpretation or, by employing Umberto Eco's (1979) way to put it, "closes" their meaning. Barthes' analysis may be applied to all kinds of *mise en scène*, including those realized by fashion companies with their communication instruments (e.g., advertising, fashion shows, store design). Yet, the existence of independent actors engaged in a work of symbolic production has implications for fashion companies, since the meanings attributed to their products and brands are (at least partially) out of their control. Consider the quotation that follows<sup>1</sup>, which reports a fashion editor's evaluation of Giorgio Armani's prêt-à-porter collection, presented during the Autumn/Winter 2004-2005 Milan Men's Fashion Week.

"The usual genius, king Giorgio. He opens his cosmopolitan view of life and his city glamour even to the straight man who works in a bank, in a hospital, or in an attorney firm. His anatomic and deconstructed jacket ... would make everybody feel like an Adonis"  
(MF Fashion, January 16<sup>th</sup>, 2004)

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<sup>1</sup> Originally in Italian. Translation by the author.

Arguably, the fashion editor is engaged in a symbolic work that contributes to the social construction of the meaning of wearing an Armani dress for "straight men" working in professional firms. The quote is best understood when considering that men's fashion sometimes adopts stylistic elements that refer to the gay subculture of consumption, and this pose limits to the extension of the market of fashionable men's apparel to those market segments who would refuse to wear clothes with such a peculiar signifying capability. The tenor of the fashion editor's account of Armani's collection is as a whole reassuring for "straight men": they may wear Armani jackets and suits at work and feel as beautiful as an Adonis, without fear of misunderstandings about their sexual orientation. Put differently, this particular editor has intervened in the relationship between signifier and signified, by arguing that Armani's "anatomic and deconstructed jacket" means "feeling like a (straight) Adonis". Of course, this does not mean that the audiences of this message will not resist or refuse the fashion editors' interpretation (e.g., Thompson & Haytko, 1997).

The editor has however provided consumers with a frame of reference that, in this case, is probably consistent with the designers' intended message, that will be reinforced with other communication instruments (e.g., advertising, point of sales communication). The fashion discourse of fashion editors may however vary a lot and provide very different frames of reference to consumers, in way that go beyond fashion designers or companies' intentions. For example, as previously noted, the symbolic production of fashion in the French newspaper *Le Monde* and in the UK newspaper *The Guardian* is rather different: in the former, fashion stories are evocative of high culture and the dream world of imaginary beings, whereas in the latter, the main characters are the celebrities that participate to fashion shows as guests or models, and fashion designers are performers providing popular entertainment (Rocamara, 2001). Similarly, the editors-in-chief of *Vogue USA* in the period 1968-1993 developed significantly different fashion narratives in their "point of view" column (O'Shea Borrelli, 1997). Thus, fashion writing may intervene in the process through which "cultural meaning" and connotations are attributed to fashion products and brands in ways that, at least to some extent, influence both consumers and fashion companies.

It is worth noting that Barthes' analyses probably downplay images' degree of influence. Images affirm much more than is evident at the first sight. Gamson, Crotau, Hoynes & Sasson (1992) argued that "the very art of social construction is invisible", and that images are a "more subtle form of meaning construction" than written texts. Images, in other words, create "structures of meaning" (Williamson, 1978) that ask us to participate in ideological ways of seeing ourselves and the world. The feminist critique to women's magazines and the preoccupations over their role in diffusing unhealthy appearance standards (see again par. 1.4.2) both underlie a similar stance on the powerful role of images. The influence over consumers, coupled with the fact that most magazines are primarily "to be looked at" (McRobbie, 1998), suggests that not only fashion editors, but also fashion stylists play a significant role in the process through which meaning is attached to "represented garments". Yet, despite this important role, "photojournalism" in fashion and other fields is under-theorized, and has so far attracted marginal attention. A possible explanation for this is the difficulties in analyzing connotative elements for large samples of images (Rinallo, 2003a,b); another is the cultural biases of most academic disciplines, that favor word over images (Hartley & Rennie, 2004).

*b. Fashion journalists as targets of fashion companies' communication*

Fashion journalists<sup>2</sup> are an important target for fashion companies' communication activities<sup>3</sup>. In this industry, a multiple-step flow of communication (Evans & Fill, 2000) can be said to exist, with companies communicating to consumers directly, through advertising, and indirectly, through public relations activities. The innovation cycle, in fashion, is at least biannual, and fashion companies twice a year launch their collections. It is worth noting that in the case of established companies, each collection may include from several hundreds to thousands of products. For these companies, it would be uneconomical to engage in mass advertising to bring more of a

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<sup>2</sup> I use the term journalists to refer to both editors and stylists.

<sup>3</sup> This does not mean that other specialized workers cannot be important target of fashion companies' communication. Celebrities and the professionals that advice them on matters of style, and costume designers for movie and theatre productions are also targeted and often provided with fashion products by producers that hope to gain in this way media visibility. The Oscar Night is a prominent example of the fierce competition among designers to dress Hollywood stars, to the extent that most celebrities are actually paid to wear a particular designer's clothes or accessories (Agin, 2000).

few of the products in collection to consumer attention. Thus, for fashion companies, the crucial target audience for promotional campaigns consists in those professionals from which they depend for providing with visibility those products that are not “pushed” by advertisements. Much like in cultural industries, where receiving mass-media coverage as book reviews or radio-station air play is key in reaching mass markets (Hirsch, 1972), also in fashion a fierce competition to obtain coverage emerges: a competition heightened by the fact that the industry is very fragmented. That said, also fashion journalists are dependent from producers for “news”. Fashion products provide “copy” and “programming” for newspapers, magazines, television programs. Thus, a relationship of mutual dependence may be said to exist between fashion journalists and fashion companies.

It must be noted that fashion companies are not equals as far as access to media is concerned. In fashion, as in other industries, fashion companies are socially stratified in terms of reputational status (e.g., Shrum & Wuthnow, 1988; Washington & Zajac, 2004; Deephouse & Carter, 2004). As nicely put by Cappetta, Cillo & Ponti (forthcoming), “[t]here is a notable pecking order among fashion industry companies”. At the highest level, there is *haute couture* (high fashion), which produces custom-made items for a restricted circle of elite consumers. Next, there is *prêt-à-porter* (ready to wear), which produces fashion products that are expensive, but not as much as to be unaffordable. Designers working for established high fashion and ready to wear companies are credited for being innovators and, as such, tend to have preferred access to the media, much more than, say, industrial brands or emergent designers. Put differently, also in this context “the right to be heard are differently distributed through the ranks of the system” (Becker, 1967: 241). Fashion journalism, on the other hand, contributes to the reputational status of companies within the industry and the media visibility some companies are provided with by the media is much greater than their economic significance (Cappetta, Perrone & Ponti, 2003).



For top-ranking companies, the most important communication instrument that is employed to communicate with the media is the fashion show<sup>4</sup>. Or, better, staging fashion shows in the context of the most important fashion weeks denotes the belonging to the most qualified offer segments of the fashion industry. For example, the worldwide affirmation of some Japanese designers (e.g., Kenzo, Issey Miyake, Yohjii Yamamoto, Rei Kawakubo) may be to a great extent explained by their successful admission to the Paris Haute Couture fashion weeks (Kawamura, 2004). Remarkable differences exist among the different fashion weeks that are staged twice a year across the globe (see Picture 4.2). *Haute Couture* fashion weeks are held in Paris, that was once the centre from which fashion styles diffused worldwide, and in Rome. *Haute Couture* fashion, typically, generates losses that are however considered as an investment to create the unique connotations of high luxury and exclusiveness that generate revenue through the sale of accessories and the licensing system (Agins, 2000). *Prêt-à-porter* fashion weeks present both men's and women's collection: the most important weeks are those held in Paris, Milan, New York and, for women's fashion only, London. Besides these events, which are global in nature, there exists a secondary circuit of fashion weeks that have a local relevance (e.g., Tokyo, Sydney, Bombay). Besides the context of the fashion weeks, companies typically stage these events in other situations that are not "comparative" in nature, e.g., in show rooms and boutiques, or in the context of promotional events.

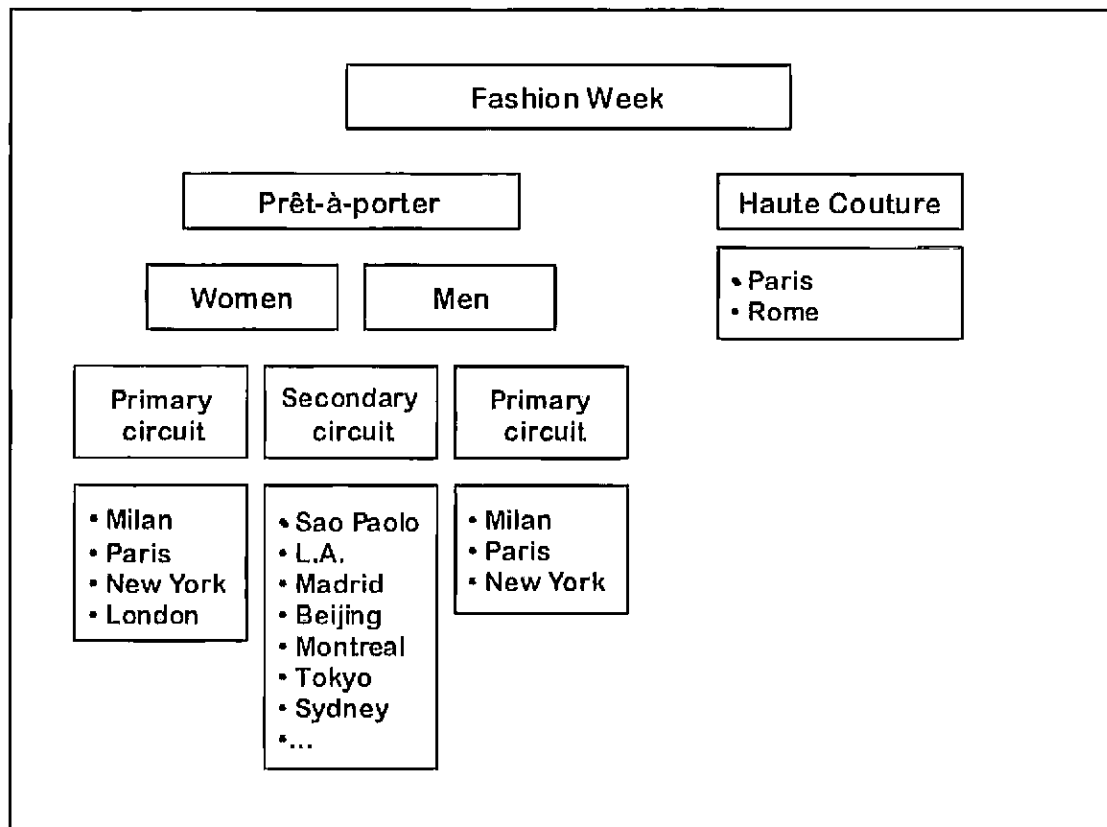
Of course, most fashion companies do not participate to fashion weeks. For them, traditional public relations instruments are employed to obtain media coverage. Among these instruments, prominent is the presentation of collections to fashion stylists, sometimes in the context of special events, in order to obtain product placements in magazines' services. Although formats may vary a lot, two typologies are most diffused: the "fashion story" and the "still life" service. The former features models wearing fashion products in such a way that an atmosphere is created (see picture 4.3 for an example). These pictures are taken by fashion photographers that, in

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<sup>4</sup> Originally, fashion shows were sales events targeting elite female buyers. Today, they are promotional events from which consumers are excluded, which predominantly target buyers and, increasingly, the media system. Before the 1950s, in fact, taking pictures of the models was strictly forbidden; in the 1970s, illustrators were allowed to realize sketches of the models for newspapers and magazines; in the 1980s, photographers and, subsequently, television gained entry (Evans, 2001).

most cases, also work in the context of fashion advertising: fashion stories and advertisements, thus, share some stylistic similarities. In Picture 4.3., all dresses are by designed by Karl Lagerfeld for Chanel; in other cases, stylists combine products from different designers that, somehow, fit together in terms of style, colors, atmosphere.

Picture 4.2 – Fashion weeks: An overview



Still-life services consists instead of “buying suggestions” arranged together with some criterion, e.g., color, stylistic contiguity, purchase and use situation (see Picture 4.4 for an example). They don’t feature live models but, on the other hand, they highlight the prices of the goods they show. Both fashion stories and still life services provide visibility to fashion companies. The former may recall brands’ connotations, while the latter may affect consumers’ purchase decisions. Fashion companies support the placements of their products within both fashion stories and still life services with the provision of dedicated product prototypes belonging to “media collections”, that will not be available in stores until months later. Here, unlike fashion writing, the

problem is not to obtain favorable reviews, but rather to obtain coverage – any coverage: the more, the better.

Picture 4.3 – A fashion story



Source: Vogue USA, n. 1, 2005

To recap, fashion editors and stylists are target of fashion companies' communication activities. Further, and particularly in the case of the consumer magazines, fashion companies are also heavy advertisers in the same media outlets that provide visibility to their products. Finally, fashion journalism as a whole stresses entertainment more than public interest (Zoonen, 1998). As noted elsewhere (par. 1.4.4 and 1.4.4), under these circumstances, it is not uncommon that companies try to exert influence over media content. Fashion companies' sources of influence over fashion journalists and media content derive both from their public relations activities and from

their advertising budget (Milkie, 2002; Steinem, 1990). By employing both, companies may succeed in obtaining for their products a visibility which is likely to affect sales. Yet, competition to access the media is severe and, to some extent, fashion journalists have some degrees of freedom in their selection decisions. For these reasons, the fashion industry appears to be a rather stimulating setting where to explore the determinants of opinion maker attention to products.

Picture 4.4 – A still life service



Source: Marie Claire UK, n. 197, 2005

#### 4.2. Research questions and overall design

My research question may be expressed as follow:

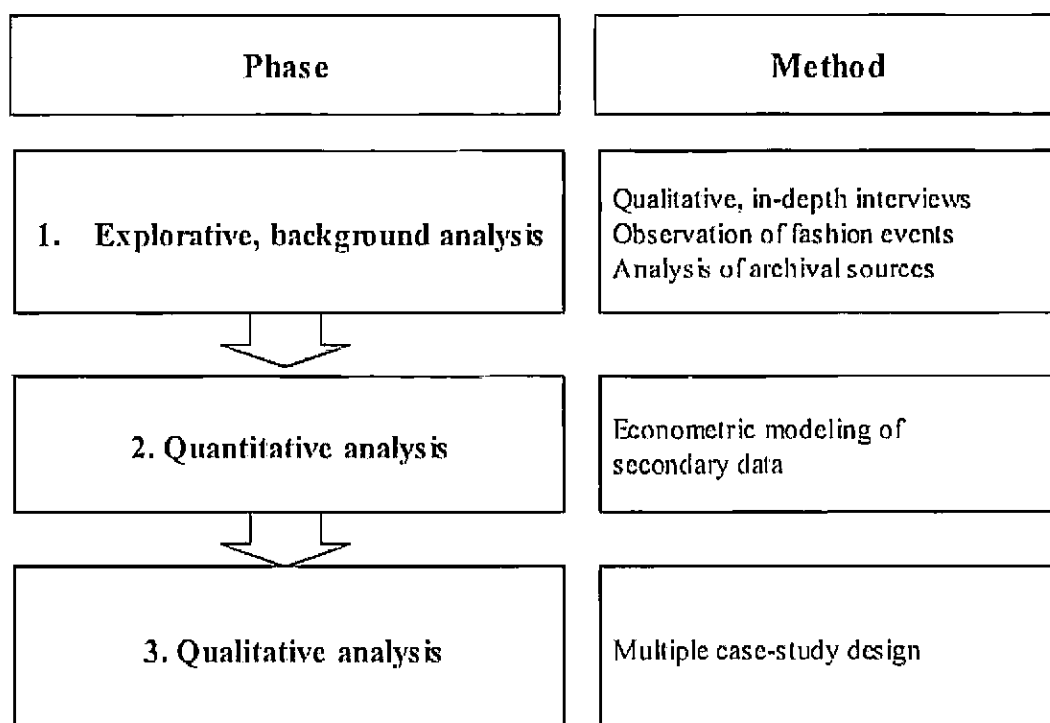
*Which are the determinants of fashion journalists' attention to specific fashion companies' products?*

From the previous review, I expect that advertising budget will likely impact the overall coverage of fashion companies' product, yet other factors may play a role. Advertising only, while explaining the media "success" of established companies could not account for the heightened visibility of some emerging companies. From a different perspective, the literature regarding specific typologies of opinion makers suggests that patterns of professional influence may exist in the context fashion journalism. Of course, fashion products' innovativeness or level of fit with consumer emerging sensibilities may also play a role. Yet, the empirical studies that have so far examined fashion journalists is fragmented and mostly useless from a marketing point of view. For this reason, I decided to conduct a preliminary study, whose results are shown in the section that follows, in order to better frame my hypotheses and to inform my data collection for the quantitative study that will be reported in chapter 5. Since however some data are difficult to obtain in this setting, I chose to conduct a follow-up to my quantitative study, based on a multiple-case study design *à la* Yin (1984), that is reported in chapter 6. The overall research design is represented in Picture 4.5.

More precisely, the goal of my *preliminary study* was to gather background knowledge useful to guide the quantitative analysis. The study is based on qualitative, in-depth interviews with fashion journalists, publishers, companies, and public relations consultants; on extensive observation of key events in the Italian fashion scene; and on elaboration of secondary sources data. Although the preliminary study, on its own, extends our knowledge of opinion makers in the fashion industry by showing the complex patterns of interaction among fashion companies and the fashion media, it also strengthens the research design as a whole, because: (i) it confirmed the assumption that for advertising companies, product visibility in fashion services is perceived as consequential; (ii) it legitimized the methodological decision of focusing on exploring the determinants of product visibility in magazines only in the quantitative study; (iii) it provided a comprehensive view of the possible determinants of the coverage a company's product receives in the media: since not all of these determinants lend themselves to be easily operationalized or measured, the preliminary study led me to an

increased awareness of the validity of the quantitative study's findings, and suggested ways to overcome its limits through the multiple case-study follow-up research.

**Picture 4.5 – Research strategy: An overview**



The goal of the *quantitative study* was to explore the relative impact of the possible determinants of fashion company's product visibility in magazines' editorial content. The study is based on the econometric modeling of data gathered from secondary sources. Because of difficulties in gathering financial sheet data to employ as control variables, I decided to focus on Italian companies only: given the prominence of the Italian competitors in the upper segments of the global fashion markets, this is assumed as not posing serious threats to the validity of findings. More specifically, for the companies in my sample, I gathered firm-level data regarding product visibility in the magazines issued by a set of Italian and foreign publishers. Thus, my unit of analysis is the dyad firm-publishers. Additional variables were employed to capture companies' advertising budget, number of fashion shows, peer pressures by other magazines. Financial sheet data were also used as control variables. For those

companies staging fashion shows, it was also possible to gather data about fashion editors' evaluations of their new collection, on the basis of fashion editors' reviews. As a whole, the complete dataset contained observation 35,793 observations (i.e., 291 companies \*123 publishers). I proposed hypotheses regarding the impact of these variables on firm-level product visibility, also suggesting a differential impact for "prestige" publishers respect to the others; and for Italian respect to foreign publishers. To test these hypotheses, I employed a multiple linear regression analysis to model product visibility as a dependent variable, and the others as its predictors. Research findings confirmed some of the hypotheses but not others, thus providing interesting theoretical and practical implications.

The goal of the *multiple case-study* was to build theory on effective ways to obtain media visibility. Since some of the variables that *should* influence media coverage of a specific company's products do not lend themselves to be easily measured for extensive samples, I decide to focus on a more limited set of case studies which I explored in detail. Case selection was inspired by a theoretical sampling logic, as proposed by Yin (1984). More specifically, I employed the results of my quantitative analysis to distinguish among "high-performing" and "low-performing" companies, i.e., those which obtain significantly more and less coverage than predicted. Overall, I analyze 12 cases through a triangulation of sources that included interviews to marketing, communication and / or public relations managers, analysis of quantity and quality of media coverage, analysis of archival data. As a whole, the results of this study provide with hope those emerging companies that cannot "push" their media visibility with big advertising budgets: other strategies are available to attract fashion journalists' attention.

#### *4.3. Preliminary study*

The explorative analysis here proposed employed a mix of methods in order to draw a comprehensive picture of the patterns of reciprocal influences among opinion makers, media, companies, and other relevant actors. More in detail, I realized:

- (i) *qualitative, semi-structured interviews* with fashion journalists, publishers, companies, and public relations consultants, as shown in Table 4.1, in order to gather first-hand knowledge of the inner working of the field. As a whole, this approach is similar to that adopted by Evans & Fill (2000) in their effort to document the interaction between motor companies and specialized journalists in the UK motor industry. The possibility to hear to different parties enriched my understanding of the themes that emerged from the analysis and permitted me to compare the points of view over given issues. As a whole, these interviews greatly added to my knowledge of the fashion industry and the media-firm relationships.
- (ii) *extensive observation of key events* in the Italian fashion scene. In the course of 2004 and the beginning of 2005, I participated as observer to male and female fashion weeks and trade shows, as shown in Table 4.2. During this fieldwork I had the opportunity to speak with many informants beyond those I formally interviewed. Thus, I was able to obtain informed interpretations of the practices of journalists and companies in the contexts where they occur. For example, difficulties to gaining entry to fashion shows for some designers (e.g., Giorgio Armani) and relative lack of difficulty in getting an invitation from others (e.g., Andrew Mackenzie) was informative of the differences in ranking among companies, i.e., those that try to attract attention vs. those that are selective because they attract too much attention. Similarly, the easiness with which I obtained some invitations after a fashion editor I was acquainted with just asked for it was informative of how strict the relationship between public relations personnel and fashion journalists is: a relationship that mixes professional and personal elements, and fosters the exchange of "favors". Participating to trade shows provided me with the opportunity to familiarize with the culture of those companies that do not stage fashion shows, yet are important players in the fashion markets (e.g., industrial brands; casual-wear and sportswear companies).
- (iii) *analyses of secondary source data*. I collected different kinds of secondary data: reviews of fashion shows, as published in the daily press; catalogues of trade shows and calendars of fashion weeks, providing information about individual companies; web-based descriptions of fashion shows, with comprehensive coverage of the items in collection; audience data from fashion week organizers. I



also obtained access to data regarding advertising and media visibility provided by an independent market research firm. These data were elaborated when needed to shed light on the issues that emerged from interviews.

**Table 4.1 – Sample for qualitative, semi-structured interviews**

<b>Interviewee typology*</b>	<b>Companies / Organizations</b>
Journalists (9)	<ul style="list-style-type: none"> <li>• <i>Newspapers</i>: La Repubblica; MF Fashion</li> <li>• <i>Magazines</i>: D – La Repubblica delle Donne; Donna; Donna Moderna; Elle; Fashion; Gioia; Mood;</li> </ul>
Publishers (2)	B-Arts; L'Uomo Vogue;
Companies (6)	Add Project; Carel Van Laere; Dama (Paul & Shark); Fashion Box (Replay), Laudomia Piccolomini; Schedoni.
PR agencies (2)	Pro Beat Agency; Studio Coluccia;

\* Between parentheses, the number of companies/organizations interviewed. In some cases, for each of them more people were interviewed.

My research findings regards the following aspects: (i) the perceived impact of media coverage; (ii) the concentration of fashion journalists attention; (iii) fashion companies influence strategies; (iv) other determinants of attention. As far as the *perceived impact of media coverage is concerned*, there appears to be an agreement among fashion companies over the fact that “coverage matters”. Generally speaking, coverage affect the reputation of a company and the image of its products. More specifically, companies mentioned two different typologies of benefits deriving from media coverage of products: on the one hand, facilitating the relationship with retailers; on the other, stimulating consumer interest and even sales. In the case of fashion shows, coverage is said to increase the possibility of capturing the attention of retailers, both independent owners and buyers of department stores. The owners of the few trendy boutiques that are said to launch local fashions are depicted as fashion connoisseurs that employ fashion show reviews to select new brands or maintain the existing. The day after a fashion show, designers typically wake up early in the morning in order to read the review of fashion editors, particularly those of influential journalists (i.e., Suzie Menkes for the *New York Times*, columnist of *Women’s Wear Daily* and, in Italy, MF

Fashion). Particularly in the case of less established companies, reviews are taken into account and may influence the development of collections (i.e., certain items that were not appreciated are likely not to enter production).

**Table 4.2 – Fashion events investigated**

<b>Event typology</b>	<b>Editions</b>
Women's Fashion Weeks	<ul style="list-style-type: none"> <li>• Milan, Prêt-à-porter Fashion Week, October 2004</li> </ul>
	<ul style="list-style-type: none"> <li>• Milan Prêt-à-porter Fashion Week, January 2004</li> </ul>
Men's Fashion Weeks	<ul style="list-style-type: none"> <li>• Milan Prêt-à-porter Fashion Week, June 2004</li> <li>• Milan Prêt-à-porter Fashion Week, January 2005</li> </ul>
	<ul style="list-style-type: none"> <li>• Milano Vende Moda, Milan, October 2004</li> </ul>
Women's Fashion Trade Shows	<ul style="list-style-type: none"> <li>• White, Milan, October 2004</li> <li>• NeoZone, Milan, October 2004</li> <li>• Cloudnine, Milan, October 2004</li> </ul>
Men's Fashion Trade Shows	<ul style="list-style-type: none"> <li>• Pitti Immagine Uomo, Florence, January 2004;</li> <li>• Pitti Immagine Uomo, Florence, June 2004;</li> <li>• Pitti Immagine Uomo, Florence, January 2005</li> </ul>

Product visibility in magazines, too, is consequential, particularly in the case of the younger companies that have to improve the distribution of their products: at trade shows, these companies gather together their press coverage in booklets that are shown to buyers in order to favorably impress them. In some cases, the buyers themselves start business enquiries when they see products they like. The relevance of this benefit, of course, decreases in the case of established companies that have a capillary distribution or own shops. Further, the visibility of products in fashion stories or still-life services (see again Pictures 4.3 and 4.4) is likely to affect their sell-out:

"After a magazine publishes a fashion service that provides visibility to one of the products in collection, consumers will go to our shops and ask for it. We may receive up to 2,000 consumer requests for that product" (marketing manager of an industrial brand)

"Every time our shoes are published in still-life magazines, there's an increase in the accesses to our Web site. We receive e-mails asking where they can be found" (entrepreneur of a newly established company)

"Of course, once the customer enters the point of sale, she may end up buying something completely different. The point, however, is that we have attracted her attention and led her to enter the point of sale. And this is not trivial..." (communication manager of a prêt-à-porter designer company)

Of course, this is not to say that these "sales" benefit are easy to measure or even monitored. One of the interviewees, perhaps impressed by my academic background, even asked for suggestion on ways to measure "in a scientific way" the impact of fashion magazine services on sales. Yet, among all the companies I interview, anecdotal evidence is considered enough to justify the investments and organizational efforts that are dedicated to the relationship with magazine-based journalists. Public relations agencies are less concerned with sales implications; they tend to consider media coverage as an end to itself, since they are not typically evaluated on the basis of the quality and quantity of the media coverage they are able to attain for their customers. Yet, they explain, "image concerns are ok, but without sales implications, our business would not have any reason to exist".

In spite of its relevance, *fashion journalists attention is both limited and concentrated*. In the case of fashion shows, a great number of fashion companies "compete" against each other for journalists time, that is limited, and for editorial space, which is even more limited. The data shown in Table 4.3 may provide a rough idea of the *de facto* competition that exists for journalist attention: yet, it must be noted that such data underestimate the overall level of pressure, since they do not take in consideration the numerous product presentations and promotional events that are held off calendars. Although fashion shows are not held contemporarily, they tend to be staged in different parts of the towns hosting them; attempts are often made by fashion weeks organizers to group them together, yet companies resist these attempt, because they want to host them in their own show rooms, or because they want to maintain the freedom to choose locations that are coherent with the spirit of the collection to be presented. As it is often said, "fashion requires its own spaces"; yet, this has implications for journalists, for whom reaching fashion shows distant from each other is a time consuming and stressful task. These problems are less sever for buyers, that tend to focus on the more limited number of companies that are of interest for them.

Journalists, on the other hand, very often at the last minute renounce fashion shows that they would have liked to attend because of distance and delay.

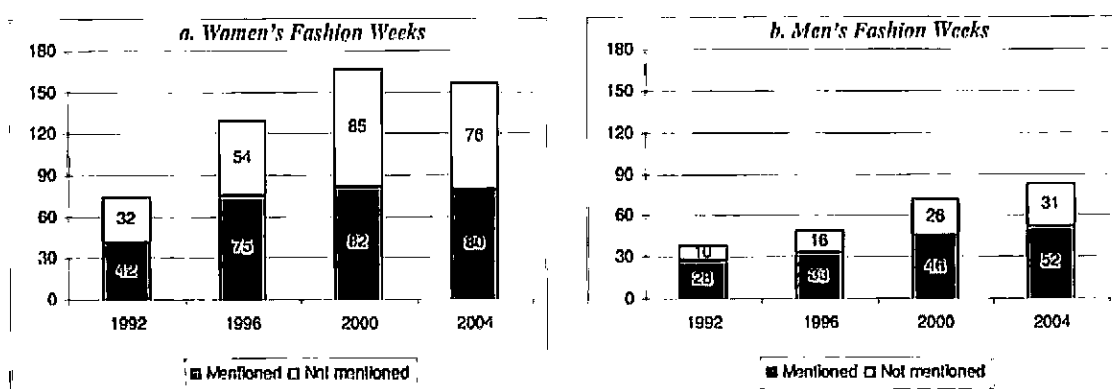
**Table 4.3 – Dimensions of the primary women’s fashion weeks (2003)**

Fashion Week	Paris	Milan	New York	London
N. of fashion shows	approx. 100	approx. 100	approx. 80	approx. 50
N. of buyers	800	1,000	n.a.	n.a.
N. fashion journalists	2,000	1,000	n.a.	n.a.

*Source:* Elaborations on Organizers’ data.

Besides being limited, journalist attention is also very concentrated. As suggested elsewhere, also in fashion access to media is “differently distributed through the ranks of the system” (Becker, 1967: 241). Both editors covering fashion shows for newspapers and journalists working for magazines are highly selective in their editorial choices. For example, as shown in Picture 4.6, only a part of the companies that present their collections in the context of the Milanese Fashion Weeks are mentioned by the Italian newspapers. Arguably, even though from the beginning of the 1990s the Italian daily press has dedicated more space to the coverage of fashion, the number of companies that take part to Fashion Weeks has increased to a greater extent. The consequence is an unequal distribution of media coverage, where a few companies attract the media attention, and the others are neglected.

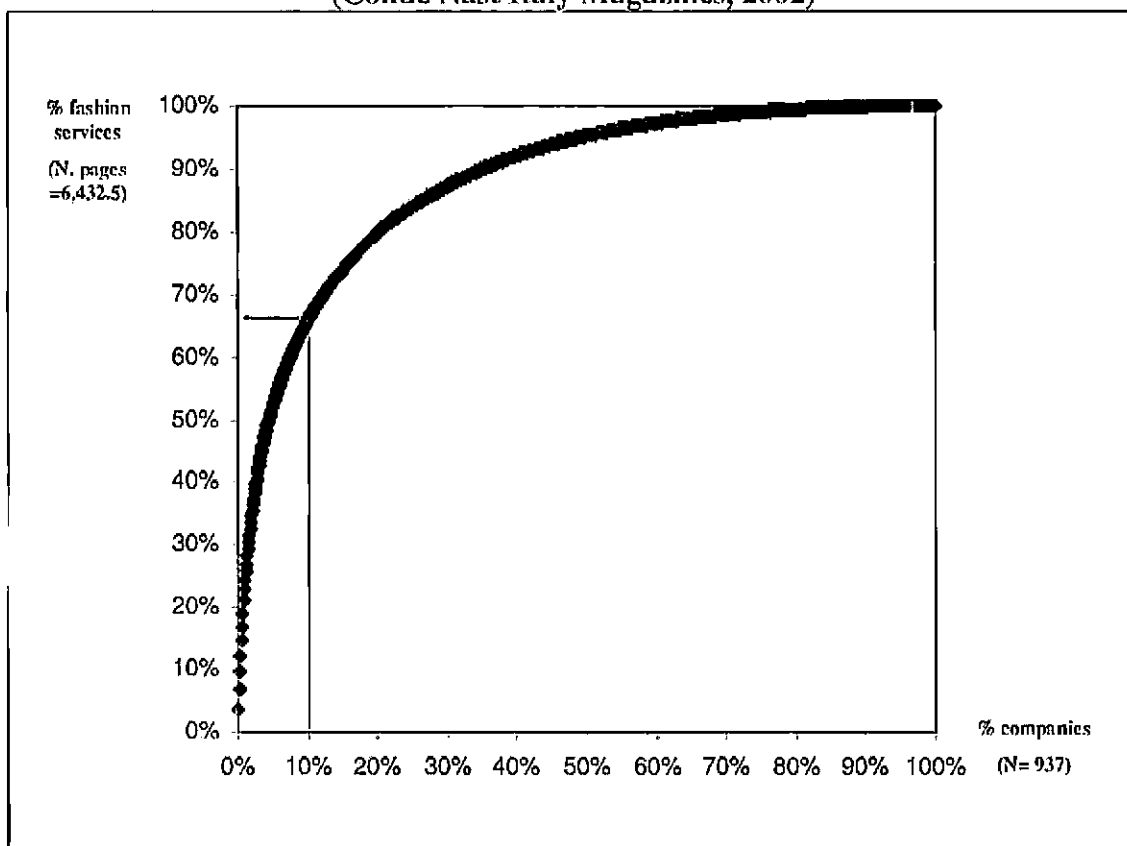
**Picture 4.6 – Fashion companies’ visibility during Fashion Weeks in Italian dailies**



*Source:* Elaboration on Organizers’ calendars and Italian newspapers. Adapted from Sibilio (2004)

A similar pattern may be observed when considering media visibility in magazines. For example, in the year 2002, the products of only 591 companies were employed in the fashion services of Vogue Italy, that, as a whole, occupied 3,236 pages. Visibility was very concentrated: around 30% of such pages was dedicated to the first 10 companies (Blufin, Prada, Dolce & Gabbana, Giorgio Armani, Gucci, Roberto Cavalli, Dior, Aeffe, Chanel, Versace). If we consider all the fashion services in magazines issued by Vogues' Publisher's, Condé Nast Italia, patterns are very similar (see Picture 4.7): around 10% of companies (i.e, 94), obtain approximately 68% of the overall visibility. On the other hand, a vast majority of companies have a very limited visibility. For these companies, the benefits of media coverage are hardly obtained.

**Picture 4.7 – Concentration of company visibility in fashion services  
(Condé Nast Italy Magazines, 2002)**

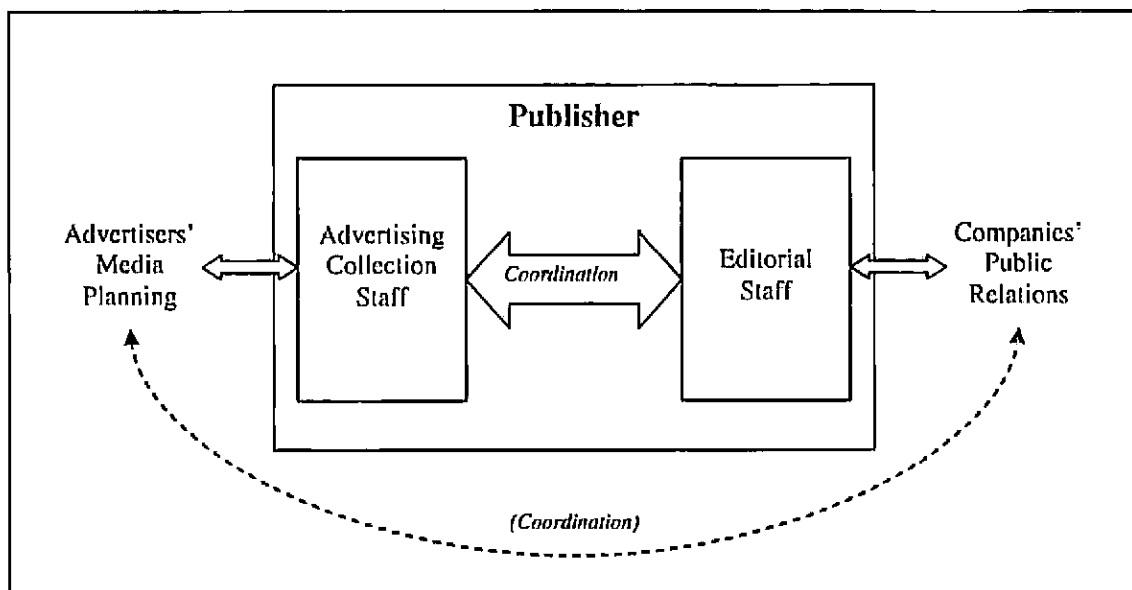


Source: Elaboration for Visual Box data.

As far as *fashion companies influence strategies* are concerned, unsurprisingly, they are based on public relations efforts that, when it is the case, are eased by the

“favorable treatment” received by advertisers. Most magazine publishers adopt an organizational structure similar to that sketched in Picture 4.8. Publishers interact with fashion companies both as advertisers *and* as sources of stories and providers of the products that are employed for the realization of fashion stories and still-life services. More precisely, editorial staffs interact with fashion companies’ public relations personnel or agencies, whereas advertising collection staffs interact with fashion companies as (possible) advertisers. Much like security analysts within investment banks (see par. 2.2.4), also in this case a potential for conflict exists between the two departments: unfavorable coverage of a company’s products by journalists may damage the advertising collection staff’s relationship with advertisers and future business. Further, magazines are heavily dependent from advertising to generate revenue, while the editorial staff does not generate revenue directly. In order to reduce potential conflicts, most magazine publishers have institutionalized an organizational position responsible of the coordination between the two departments.

Picture 4.8 – Publisher-companies interfaces



Unlike security analysts and “public interest” journalists, the fact that advertisers receive a favorable treatment does not seem to raise ethical concerns. For publishers, “it’s part of the rules of the game that journalists accept to play”. For companies and PR agencies, “it’s the way things are”, to be exploited when possible. For journalists, the

situation is interpreted in terms of constraints over their professional choices rather than as conflicts of interest or lack of responsibilities towards their readers. And most journalists prefer to stress their autonomy in coverage decisions over their restrictions. Thus, for example, journalists say that a specific company's advertising budgets only determines the number of products to place within fashion services, and they are free to choose, within the collection, those they prefer. Moreover, once "rule of reciprocity" obligations are fulfilled, they are completely free in their coverage decisions. As shown in table 4.4, even when advertising is taken into account, there is enough variability in the number of products covered in fashion services to suggest that advertising is just a part, albeit important, of a more complex story.

**Table 4.4 – L'Uomo Vogue (Italy):  
Advertising pages and product coverage of selected companies (2003)**

Company	N. of Advertising Pages (a)	N. of products covered in fashion services (b)	Ratio (b/a)
Valentino	7	102	21.14
Costume National	2	36	18
Moschino	4	44	11
Dolce & Gabbana	35	338	9.66
Giorgio Armani	22	198	9.00
Versace	8	55	6.88
Lacoste	13	29	2.33
Mabro	18	6	0.33
Adidas	0	80	n.a.
Levi's	0	48	n.a.
Yohjii Yamamoto	0	35	n.a.

*Source:* Elaborations on Visual Box data.

Public relations efforts, even when not aided by advertising budget, are instrumental in explaining a part of the differences in media coverage among companies. One of the public relations agencies I interviewed is specialized in helping young companies that lack advertising budget to obtain some level of visibility in

magazines. Another suggested that, also for more established companies, “we’re evaluated on the basis of the media visibility that we are able to provide our customers with, particularly in magazines where they don’t advertise”. Thus, “clever PR’s are able to place products also when not backed by advertising budgets”. Of course, the relative success of their efforts will depend on the reputational status of their employers or customers. Since, as previously argued, journalist attention is unequally distributed, some companies will receive *too much* attention while others *not enough*. In the former case, public relations practitioners are in a vantage position, since they may gatekeep (both quantitatively and qualitatively) journalistic access to sources and products, and affect in this way the productivity of editors and stylists. In the case of companies that find it difficult to attract enough attention, on the other hand, public relations personnel is much more dependent from journalists.

The relationships between fashion PR practitioners and fashion journalists is however very strict and based on an overlap between professional and personal elements, where “exchange of favors” is routine. Put differently, the centrality of the position occupied within this network of personal relationships may affect professional effectiveness. At the beginning of their careers, the “social capital” of public relation practitioners and journalists is low. Yet, as they become more established in their occupation, they progress from the margins to the center of the networks. The fact that not all PR practitioners are equal was evident in the conversations I had with fashion companies and public relations agencies:

“Years ago, when I first started this job, it was hard to obtain their [i.e., journalists’] attention. Now, I’m very close to some of them, and in this case it’s much easier placing products” (PR practitioner working for an established agency)

“Our internal PR manager is now in maternity leave, so we decided to rely on an external PR agency until she comes back. You know, it would be a nonsense to hire a new resource for just this limited period, it takes a lot of time to get to know how it works and being recognized by journalists” (Marketing manager of a prêt-à-porter brand)

“Our advertising budget is limited, so it’s important that our public relation agency is well introduced with journalists” (Marketing manager of an industrial brand)

“If I call them, ok, they know my company so I’m not a perfect stranger, but if it someone they know it’s different. They start chatting and make gossips, and things are much easier” (Marketing manager of an industrial brand that employs and external PR agency)



Besides advertising budgets and public relation's social capital, in the course of my preliminary study I encountered *other determinants of media coverage*, among which, prominent, is "the product", or, more specifically, its innovativeness and ability to fit audience tastes. As far as the former is concerned, may variations of the theme "journalists are hungry of novelties". This is hardly surprising, since newsworthiness of stories is a general rule of all kinds of journalism. It must be noted, however, that in fashion not all *new* products are equally *newsworthy*. In fashion, almost by definition, products are continually modified in order to match with consumer tastes. To attract journalist attention, fashion products innovation level must be *above* normal levels. This may occur in different ways: technical components, affiliation with celebrities, unusual accessories.

Moreover, newsworthiness is hard to sustain. One of the companies I interviewed is a very young entrepreneurial firm that started its activity with the idea of odd shoes, the left one different from the right, but with patterns and colors that fit together. They enjoyed immediate media visibility when they presented their collection in 2004, yet the newsworthiness of their products is doomed to decrease. People in the field are well aware of "meteors", i.e., brands that thanks to their creativity enjoyed heightened visibility one season, but were forgotten immediately after. Public relations agencies are aware of the fact that, in order to sustain stable levels of coverage, "you have to avoid that the product is burned out by too much exposition", and that "a strong communication project is needed in order to provide the press, season after season, with new reasons for interest". The principle of newsworthiness has however some exceptions in the practice of those established companies that adopt, at least for a part of their collections, the distinctive style that consumers have learnt to identify. Both approaches may pay as far as journalist attention is concerned, as shown by the quotations taken from fashion show reviews that follows.

"John Galliano continues to amaze, with a collection that doesn't give up its spectacular *coté*, but that contains some interesting creations (*in primis*, accessories)" (MF Fashion, March 7th, 2003, Review of Christian Dior's Paris Prêt-à-Porter fashion show)

"With Miyake, nothing is to be taken for granted. Takizawa's research shows a talent and a style which are not common. Always very interesting and avant-garde the materials proposed" (MF Fashion, March 11th, 2003, Review of Issey Myake's Paris Prêt-à-Porter fashion show)

"Quintessential Chanel. Today more than ever the *maison* quotes itself and re-discovers its more traditional soul" (MF Fashion, March 11th, 2003, Review of Chanel's Paris Prêt-à-Porter fashion show)

"The season's message is Very Valentino ... The collection shown ... is a rewriting of the V philosophy. The designer chooses to highlight his own background" MF Fashion, March 11th, 2003, Review of Valentino's Paris Prêt-à-Porter fashion show)

Finally, it must be noted that newsworthiness may be at odds with the product's usability for consumers. Some of the products that succeed in attracting attention are provocation that do not have a market. This is particularly evident in the context of fashion shows, where models sometimes wear items that, simply, are not wearable; magazines, too, also place odd products in their fashion services. In the case of magazines, journalists' preferences are typically mediated by audience tastes (and economic possibilities) and the overall positioning of the magazines (i.e., fashion vs. buying suggestions). Although a certain level of compromise exists (here, again, advertising-based pressures play a role), "prestige" magazine will likely resist inserting items that are too much "below their level", as evident in the quotations that follow.

"I personally like Issey Myake's style, but my readers could hardly afford his dresses. Therefore, if I have to place his dresses in fashion services, I'll rather choose a white T-shirt than a sophisticated cocktail dress" (Journalist working for a popular women's magazine)

"Sometimes, we are required to place products that do not really fit with the overall tone of our magazine... We occasionally do that, but it's like prostitution" (Magazine publisher)

"Sometimes, companies that we wouldn't normally consider for our fashion services start to advertise aggressively... However, they cannot protest too much if we do not provide them the same level of visibility of other advertisers... When their products will be ok for us, they'll receive equal treatment" (Publisher of prestige magazine)

To shed more light to the interplay between journalist preferences, audience preferences, and product usability, it is worth reporting here the result of an experimental study in which I was involved (Mazursky & Rinallo, 2004). It was found that, contrarily to expectations, fashion journalists are typically able to distinguish own preferences and judgments from those of their audience. This is not a trivial result, since in most cases, those who take decisions for others tend to "project" their opinions (Hoch, 1987; 1988), a phenomenon also known among social psychologists as the "false consensus effect" (Ross, Greene & House, 1977). Moreover, fashion journalists' selection decisions reflect both own and audience's preferences. Finally, and

unexpectedly, product considered less usable by readers are *more* likely to be selected for fashion services, arguably because they may be informative of fashion trends and emerging styles. Thus, it seems that odd, non wearable items are high in newsworthiness.

Finally, some of my interviewees mentioned the fact that journalists tend to “look at each other”, i.e., are influenced by coverage choices of colleagues. Journalists tend to downplay peer influence within their occupational communities, yet, companies note and are sometimes able to exploit this “herding” behavior. During fashion shows and other events, fashion editors meet with colleagues working for other media organizations; in these occasion, they compare their own judgments and evaluations. The communication managers of some companies noted that “within the same country, reviews about our fashion shows tend to be similar in tenor; for example, our collection may be liked by all Italian journalists, and disliked by all those from Japan”. The young “odd shoes” company previously mentioned stated that after their first insertion in an magazine’s still-life service, they were spontaneously contacted by many other journalists. Journalists tend in fact to read a lot of magazines, in order to keep themselves informed of “what’s going on” and what their colleagues are doing. This behavior generates a peculiar kind peer influence that spreads from more prestigious to less prestigious magazines, and from more fashionable to less fashionable countries. Thus, for example, once published in *Vogue*, products are often noticed by other lower ranking magazines. Further, the foreign press is especially considered and employed as a “source of inspiration”. The publisher of a prestige magazine I interviewed said that in some cases “we receive advertising and insertion request by foreign companies that are not even distributed in Italy. Once they are published in our magazine, they are more likely to get the attention of their national press”.

To recap, in this preliminary study, I investigated the working routines of fashion opinion makers and their interaction with fashion companies. In spite of its exploratory nature, it is a first step in extending the knowledge of opinion makers in the fashion industry, in ways not too much dissimilar from what other contributions have done for other industries (e.g., Evans & Fill, 2000). Further, my research findings

legitimate my decision to adopt a “supply-side” approach: at least in perceptions of fashion companies, “media coverage matters” and exploring its determinants is interesting for managerial implications, particularly for less established companies. Finally, the first-hand knowledge I gathered helped greatly improve the overall research design of the empirical part of the present dissertation. Firstly, it legitimates my choice of restricting my quantitative investigation to the determinants of product coverage in magazines only: unlike what sustained by Roland Barthes’ (1983 [1967]), in fashion, images seem to be more consequential than words as far as brand image and sales are concerned. Secondly, the study provided me with a comprehensive view of the possible determinants of the coverage a company’s product received in magazines. Since, as it will be shown in the chapters that follow, not all of these determinants lend themselves to be easily operationalized or measured, the legacy of the present study is an increased awareness of the validity of the quantitative study’s findings, and the decision to realize a follow-up study based on a multiple case-study design.

## 5. The quantitative study:

### Patterns of influence over magazine coverage of fashion products

My preliminary study permitted to conclude that media coverage “matters” for fashion companies, that fashion journalists’ attention is limited and unequally distributed among companies, and that there are many factors likely to influence the quantity (and quality) of the visibility a company receives in media outlets. In this chapter, I employ these findings in order to assess, with the help of a quantitative research design, the relative contribution of different factors to such visibility. Put differently, I am here adopting a “supply-side” approach, i.e., I consider media coverage as a *dependent variable* and investigate its determinants, rather than considering it as an *independent variable* likely to influence sales or profitability<sup>1</sup>. In doing so, I was inspired by a number of benchmark studies developed by scholars in other disciplines that have employed a similar approach in their investigations of other typologies of opinion makers, i.e., security analysts (e.g., Hayward & Boeker, 1998), restaurant critics (Chossat & Gergaud, 2003), book reviewers (e.g., Janssen, 1998).

Some preliminary remarks are useful for appreciating the scope (and limits) of the quantitative study I am going to report.

- Firstly, I am focusing on Italian companies only, even though I consider the coverage of their products in selected foreign countries (France, Germany, UK, USA). Although Italy is a big player in the global fashion industry, and the “rule of the game” that govern media coverage (in Italy and abroad) of these companies are unlikely to differ greatly, country-of-origins effects may play a role in explaining

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<sup>1</sup> It is worth mentioning the fact that in an early phase of the development of the present dissertation, I also considered the possibility to jointly investigate in a quantitative manner “demand-side” research questions, which have so far attracted more attention by marketing scholars. Yet, if we consider those studies that have focused on the influence of opinion makers over audience on an aggregate level, we discover that they have been conducted in a context characterized by a facilitated availability of secondary data about performance that can be linked to individual “products” (i.e., movies, Broadway shows). In the empirical setting that I chose to investigate pragmatic reasons advised against such an approach, because of the difficulties in obtaining sufficiently fine-grained data from secondary sources; the fragmented nature of the industry, where most companies are SME not accustomed to data transparency; and the organizational culture of even the bigger companies that tend to keep their “secrets of the trade” repaired from external scrutiny, also because of fear of imitation.

patterns of journalistic attention in foreign countries. Fashion companies from both France and Italy, for example, collectively enjoy a distinctive brand image (Corbellini & Saviolo, 2004) that companies from less reputed countries lack. By limiting my analysis to Italian companies, however, the effect of positive or negative countries-of-origin effects cannot be assessed.

- Secondly, I am focusing on the coverage obtained by fashion products only in the context of the “visual” services published by magazines (i.e., fashion stories and still-life services, as the ones shown in Pictures 4.3-4.4). While written news reported by newspapers (particularly for those companies which stage fashion shows) may significantly contribute to reputation and brand image, they are however less likely to directly affect sales, as noted in the course of the preliminary study reported in Chapter 4. The timing of fashion services in magazines, moreover, is fine-tuned with consumers’ purchase cycles (e.g., in summer, they show swimsuits, in December, they propose gift ideas for Christmas and dresses for New Year’s eve), whereas the same cannot be said for newspaper articles dealing with fashion, that mostly refer themselves to the presentation of collections, individually or during collective events as fashion shows or trade fairs (CENSIS, 1993), that occurs far in advance of the moment when they will be delivered to retail outlets. For example, collections for the Autumn/Winter 2004/05 season were presented, and originated related newspaper articles, in January/February 2004, while fashion services in magazines covering the same collections appeared only in September 2004 (or August, in countries with a colder climate). Although the former may influence retailers’ purchases, it is only the latter that affect consumers’ preferences and buying behavior.
- Thirdly, in order to obtain “measurable” indicators of magazine coverage enabling econometric modeling, I focus on the “quantity” of coverage rather than its “quality”. In other words, I assume that more is better. However, this is not always the case, particularly for those highly reputed companies that would prefer avoiding coverage in magazines targeting audiences that do not correspond to their preferred market segments. Moreover, magazine services could be more or less coherent with the producer’s brand images. Yet, some of these “qualitative” aspects are hard to measure for analyses conducted at the aggregate level as those I am proposing here.

- Finally, the unit of analysis that I consider is the dyad company-publishers. In other words, for all the companies in my sample, I gathered publisher-specific data about media coverage. Thus, for example, in the case of Versace, my dataset includes observations about the coverage of its products in fashion services of all the magazines published by, among others, Condé Nast Italy, Axel Springer (Germany), Hearst (France), Dazed Group (UK), Fairchild (USA), and many more. Alternatively, I could have considered more fine-grained levels of analysis (i.e., the single magazine or the single journalist). But fashion services' authorship data are not always reported, and this limited the possibility to consider the latter alternative. Coverage at the level of the single magazine could have been a more feasible alternative. Yet, the lack of information about the organizational structure of each publisher (e.g., the relative level of editorial autonomy of each magazine; separate vs. collective advertising collection staffs) supported the decision of a more aggregate level of analysis. For example, journalists often realize fashion services for more than one magazine within the same publishing house. Further, in the case of advertiser pressures to obtain coverage, "compensation" effects could exist among the magazines belonging to the same publisher (e.g., advertising on Magazine X leads to increased product visibility in editorial content in Magazine Y). For these reasons, I deemed the dyad company-publisher more appropriate.

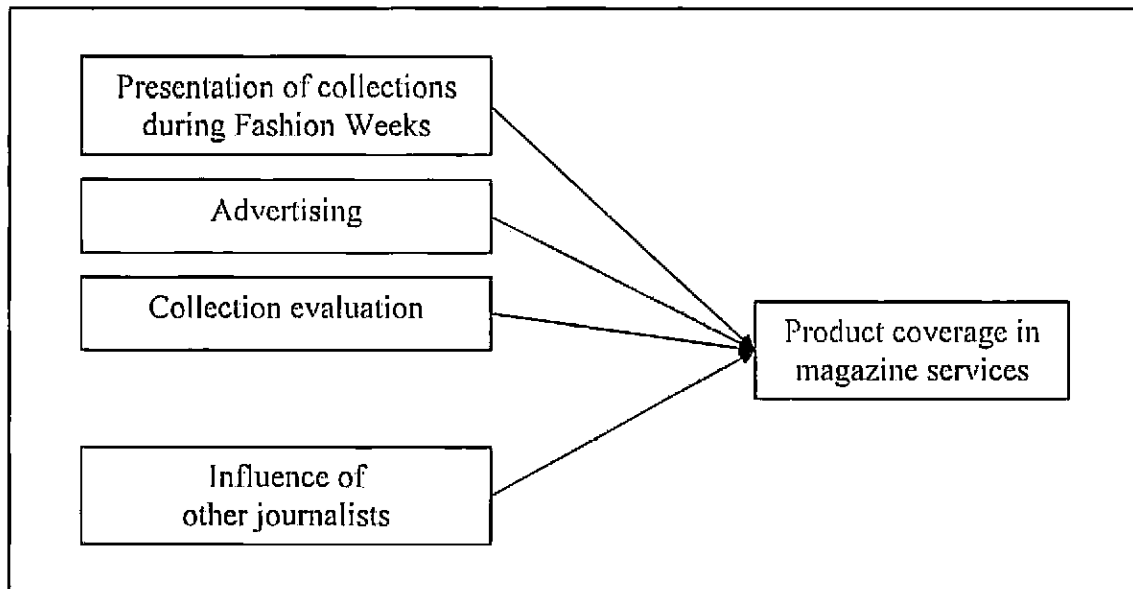
The structure of this chapter is as follows. In the first section, I propose the hypotheses that will be tested. Subsequently, methodological aspects regarding the data employed, their sources, the statistical procedures employed in the analysis will be discussed. Finally, main results will be reported and discussed.

### *5.1. Hypotheses*

As previously remembered, the present study intends to investigate the relative contribution of different determinants to the quantity of coverage the products of a given fashion company receive in magazine fashion services. Hypotheses were derived by having in mind the common themes highlighted by the review of the disciplines that

have examined different typologies of opinion maker and the results of the preliminary study reported in the previous chapter. An overview of the research hypotheses that I managed to test is sketched in Picture 5.1.

Picture 5.1 – An overview of the hypotheses tested



More specifically, a common theme in media studies is that “the right to be heard” is unequally distributed (Becker, 1967), and that high-status actors benefit from a preferential media access. In the fashion industry, higher ranking companies are those that present their collections during Fashion Weeks. Companies that organize fashion shows within these collective events are considered also by journalists as higher in rank, since they propose the style innovations that tend to be imitated by companies of lower standing (i.e., followers). Since these events explicitly target fashion journalists, they are likely to affect coverage decisions. It is worth noting that high ranking companies differ in the number of fashion shows that they organize to present their different product lines. Some companies participate to both *haute couture* and *prêt-à-porter* fashion weeks, whereas others only focus to *prêt-à-porter*. Some companies present both men’s and women’s collections in the context of Fashion Weeks, while others focalize their communication efforts either the former or the latter (typically, the one that most contributes to their turnover). Finally, some companies organize more fashion shows



within the same Fashion Week: it is for example the case of Dolce & Gabbana, who presents both their “first label” and the younger, more casual line, “D&G”. Because more fashion shows imply a greater communication halo around the company, I expect that the number of fashion shows a company organizes will impact the coverage of its product in fashion services. Hence:

*H1. The more fashion shows a company organizes, the greater the coverage of its products in fashion services.*

Another common theme in media studies is the fact that advertisers exert influence over media content, particularly in the case of journalistic specialties with a leisure, rather than public interest, orientation. In my preliminary study, I found that advertisers expect a “favorable treatment” from publishers as far as coverage of their products is concerned. Moreover, the rule of reciprocity implies that an increase in advertising budget will lead to a greater coverage (and vice versa). Hence:

*H2a. The more a company advertises in a given publisher, the greater the coverage of its products in that publisher's fashion services.*

*H2b. The greater the increase (decrease) of the advertising budget a company invest in a given publisher, the greater (lower) the coverage of its products in that publisher's fashion services.*

Other determinants of the overall visibility a product receives in fashion services may depend upon fashion journalists' peer pressures to conformity within the occupational community. Patterns of mutual influence among opinion makers working for different organizations were noted by a number of studies regarding other specialized journalists, literary critics, security analysts. Thus, products of companies that are extensively covered by other publishers may enjoy greater coverage, because

fashion journalists “tend to look at each other” and keep themselves informed about the fashion services realized by colleagues working for other publishers. Although foreign magazines may also function as sources of inspiration, on the basis of my preliminary findings I propose that these “herding” phenomena will work especially at the national level. Hence:

*H3a. The greater the mean coverage of a company's products in the fashion services of other same-country publishers, the more a focal publisher will cover that company's products in its own fashion services*

Divergence of opinion among fashion journalists may also impact coverage decisions. The products of some companies may exhibit a high level of variance in coverage among publishers: for example, they may be very often placed in the fashion services of Condé Nast Italy, but completely neglected by Mondadori. A low variance, on the other hand, means that most publishers attribute to a company's products roughly the same level of visibility in fashion services. Here, I propose that in the crowded magazine industry, most publishers would prefer position their editorial products in distinctive ways, in order to “look different” in the eyes of readers. Vogue would not publish a certain product once it has appeared in a lower ranking magazine. Similarly, magazines targeting young consumers that tend to adopt street-style fashion would hardly resemble Vogue. Thus, I propose that in general, lack of consensus (higher variance) will lead to a greater coverage of a company's products in a focal publishers' fashion services. Hence:

*H3b. The greater the variance in coverage of a company's products in the fashion services of other same-country publishers, the more a focal publisher will cover that company's products in its own fashion services*

A further determinant of coverage decisions will likely consist in the products themselves. Journalists are “hungry of novelties” and in their selection decisions may

prefer newsworthy fashion products that are likely to be informative about new fashion styles for their readers. Other products, on the other hand, may be chosen because they are ageless or quintessential of a specific company or style. Data about fashion journalists' appreciation of a given company's seasonal collections are difficult to obtain, but an important exception exists: that of those companies that stage fashion shows in the context of Fashion Weeks. Because of the heightened media attention dedicated to such collective presentations, fashion editors' reviews of collection, which are published in newspaper and publicly available, lend themselves to be employed as indicators of the overall appeal of a collection. Although occupational differences exist between editors "who write" and stylists "who create visual images", their occupational culture may be similar enough to assume that they may receive similar impressions. Hence:

*H4. The better the evaluation of a company's collection, the greater the coverage of its products in fashion services.*

Moreover, I also propose that there will be national differences among publishers in their treatment of Italian companies. As previously noted, in fashion country-of-origin effects play a role in consumer and, arguably, journalistic decisions. For example, French publishers may favor companies participating to Paris Fashion Weeks, and neglect those that present their collections in Milan. Further, in some countries, the rule of reciprocity and its requirement of "favorable" treatment for advertisers could be less strictly enforced. Thus, the predictive power and statistical significance of some of the variables may change. Finally, there could be individual differences among publishers, differences based on organizational, rather than national, culture. For example, I expect that publishers such as Condé Nast, that holds a portfolio of magazines that focus on exclusive fashion, will give companies that present their collections during fashion weeks more attention than publishers targeting more popular audiences. Similarly, I also expect that those publishers whose advertising revenue is mostly generated by fashion companies will pay more attention to the rule of reciprocity than publishers that depend from the advertising budget of companies belonging to a

wider set of industries. Although I don't formally propose hypothesis on this, I will explore and discuss patterns of differences among publishers.

## 5.2. *Methods*

My *sample* consists of 291 Italian companies and the quantity of coverage their products received in a sample of 123 publishers from different countries. Since my unit of analysis is the dyad company-publishers, this means that my data set is composed of 35,793 cases (i.e.,  $291 \times 123$ ). The list of companies and publishers included in my dataset is reported in Appendices 5.1-2. Companies were included in the sample on the basis of the availability of financial sheet data, to be employed as control variables, from secondary sources. With a few possible exceptions, all Italian companies for which such data are publicly available were included in the sample. That said, since in Italy most fashion companies are SMEs, this means that the sample has a very good representation of bigger companies, while smaller companies are underrepresented. The companies investigated also include Italian subsidiaries of foreign fashion companies (e.g., Chanel, Vivienne Westwood, Levi's).

I gathered data about the visibility of these companies with respect to 61 Italian publishers; 15 from France; 15 from Germany; 16 from UK; 16 from USA. The greater number of Italian publishers reflects both a more crowded magazine publishing industry and a greater coverage of Italy by my data source. The sample for non-Italian publishers, although more limited, however represents most (if not all) of the most important players in their national arenas, at least in terms of Italian fashion companies' interests. Observations regarding countries less represented in terms of number of publishers (e.g., Spain, Russia, Japan) were not however included. Since analysis were conducted also at the national level, the overrepresentation of Italian publishers arguably does not bias results.

The *dependent variable* for my analyses is the quantity of media coverage a given company receives by a given publisher's magazines. Data were provided by Visual Box srl, an independent market research company, and gathered on an annual basis with reference to the year 2003. I employed three different measures of the dependent variable: (i) the number of product placements in fashion services, (ii) the equivalent number of pages; (iii) whether the company has received placement in magazine cover pages. As far as the first two measures are concerned, the former counts every single product placement as '1', while the latter is a weighted measure, that takes into consideration the presence of other products and the relative dimensions of the placements. For example, if a fashion service features a model wearing a Versace shirt over Armani trousers, each of the two companies will be attribute 1 placement but only 0.5 equivalent pages. Thus, two companies with the same number of placements may enjoy very different levels of visibility. For example, in 2003, both GAP and Hermès received 45 placements in Vogue France fashion services, but the former received 7.68 equivalent pages, whereas the latter 13.03 (i.e., almost 70% more). Although these two measures of media coverage are heavily correlated, the equivalent number of pages is a more appropriate indicator to measure the overall (i.e., weighted) level of visibility a brand receives in fashion services. The third dependent variable is a dummy variable, i.e., it equals '1' if a publisher has placed a given company's products in the cover page of at least one of the magazines it has published; it equal '0' otherwise. For example, in 2003, Condé Nast has placed some Versace dresses in the cover pages of its magazines ('1'), but has employed no Benetton products for this purpose ('0'). Cover page placements are necessarily limited, yet they are highly desirable for fashion companies. Thus, it seems meaningful to investigate also this dimension of magazine coverage.

The *independent variables* I employed in the analysis are as follows.

- *Fashion shows* is the total number of fashion shows within Fashion Weeks that a company organizes in the period 2002-2003. Data about the number of fashion show (both *haute couture* and *prêt-à-porter*, both male and female) in Paris, Milan and Rome for each of the companies in the sample were obtained by the official calendars of the organizing institutions for 2002 and 2003. I employed an extended

time-horizon (i.e., the 2002-2003 two-year period) because fashion shows present collections that will be available to consumers (and presented in fashion service) almost one year in advance of their reference season (i.e., spring/summer 2005 collections were presented in July/September 2004). Since fashion shows are employed to maintain relationships with fashion journalists, I also assumed that they are likely to influence *present* and not only future product coverage in fashion services, and also included data for 2003.

- *Advertising* is a fashion company's total number of advertising pages in each publisher's portfolio of magazines for the year 2002. This variable is a proxy for the company's advertising budget, that would have been an alternative measure of publisher dependence. Advertising rates could have been employed to estimate advertiser budget, yet publishers tend to aggressively employ undisclosed discount policies for competitive reasons, making comparison difficult, so I preferred to employ certain quantities instead of uncertain values.  $\Delta$  *Advertising* is the difference in the number of advertising pages from 2002 to 2003. It is positive if in 2003 a company increased its advertising pages in a given publisher; it equals 0 if there were no changes in the number of advertising pages. It is negative if the company decreased its advertising pages. For both "Advertising" and " $\Delta$  Advertising" data were provided by Visual Box srl.
- *Mean coverage* is the mean of the coverage of a company's products in the fashion services of other publishers within the same country in 2003. *Variance in coverage* is the variance in the coverage of a company's products in the fashion services within the same countries. Data were computed for both measures of the independent variable (i.e., both number of product placements and equivalent number of pages).
- *Mean collection evaluation* is a measure of the mean evaluation a company's collections receive in fashion show reviews. As previously noted, this variable was obtained only in the case of those companies that stage fashion shows in the context of official Fashion Weeks (i.e., 53 companies only, or 18% of the total sample). For this reason, analyses to test H2 will be separately conducted in a subset of my database. Although many newspapers publish reportages during these events, their

attention is generally focused on a very limited number of highly reputed companies (see again Picture 4.6). Moreover, also mentioned companies receive a cursory attention, which tend to be descriptive rather than evaluative. For this reason, I employed as data source the collection reviews published by MF Fashion, an Italian periodical targeting the fashion industry. Because of its expert audience, MF Fashion covers all companies included in a Fashion Week's calendar and contains explicitly evaluative sections. Reviews were content-analyzed by a research assistant with the help of two different coding scheme. The first was adapted from Shrum (1991), who employed it in the context of theatre reviews. This measure ranges from -2 (very negative review) to +2 (very positive review), as reported in Appendix 5.3. An alternative measure I employed is the Janis-Fader coefficient of imbalance (Janis & Fadner, 1965; Deephouse, 2000; Pollock & Rindova, 2003). This indicator is especially suited for econometric analysis, since it is a continuous variable ranging from -1 (all negative remarks) to + 1 (all positive remarks), as reported in Appendix 5.4. Unsurprisingly, both variables resulted to be highly correlated. In order to check for inter-rater agreement, I employed the same coding schemes on all reviews regarding a random sample of 15 companies (i.e., 28.3%). The two raters agreed on approximately 80-85% of the codes (depending on the scheme adopted), suggesting high intercoder reliability (Weber, 1990).

Finally, *control variables* regarding company age, size (number of employees, turnover, total assets) and profitability (ROE, ROS) were also gathered from secondary sources. Data from different providers were triangulated in order to increase the sample size to the present 294 companies. The model I tested with is the one that follows:

$$\text{Media coverage}_{ij} = f \left\{ \begin{array}{l} - \text{mean coverage}_i; \\ - \text{variance in coverage}_i; \\ - \text{fashion shows}_i; \\ - \text{collection evaluation}_i; \\ - \text{advertising}_{ij}; \\ - \text{control variables}_i. \end{array} \right.$$

where the subscript 'i' refers to the  $i^{\text{th}}$  fashion company, and the subscript j refers to the  $j^{\text{th}}$  publishers. More precisely, in order to verify the relationship among dependent and independent variables, I employed a multiple linear regression based on Ordinary Least Squares (OLS) in the case of the dependent variables "N. of product placements" and "Equivalent number of pages". In the case of the third dependent variable, "coverage in cover pages", I employed a binary logistic regression, since this procedure is more appropriate for dummy variables. To conclude, I run separate analyses on a subset of the total sample to test hypothesis H2, since the variable "mean collection evaluation" is available only for those companies that participate to Fashion Weeks, as previously noted.

### *5.3. Main findings*

#### *a. the full-sample analysis*

Table 5.1 presents descriptive statistics for the full sample of dyads company-publishers. The correlation matrix is reported in Appendix 5.5. A few preliminary notes must be made with reference to the high level of correlation found among those variables that measure the same constructs. Thus, for example, the two independent variables (i.e., number of placements and number of equivalent pages) are unsurprisingly highly correlated ( $r = 0.980$ ,  $p < 0.001$ ), as also in the case of ROS and ROE ( $r = 0.555$ ,  $p < 0.001$ ); Turnover and Assets ( $r = 0.916$ ,  $p < 0.001$ ).

Table 5.2 reports a subset of the full correlation matrix, with the purpose to highlight the correlation between each of the predictors included in the model and the two dependent variables. The variables considered in hypotheses H1-H3 are all highly correlated in a statistically significant way; further, the sign of the correlation coefficient is in the direction hypothesized. Among these variables, those with greater magnitude are "advertising" and "mean coverage in other publishers". As far as control variables are concerned, it is worth noting the fact that "number of employees" is not correlated in a statistically significant manner with the two dependent variables.



Moreover, and curiously, “company age” is negatively but significantly correlated to media coverage, although in a weak way. Possibly, in fashion there may be a “liability of newness” as far as product visibility in fashion services is concerned.

**Table 5.1 – Descriptive statistics for the full dataset**

Variable	min.	max.	mean	Std. deviation
N. of placements in 2003	0	1,078	4.362	26.082
Mean placements in other publishers in 2003	0	105	4.232	10.021
Variance in placements in other publishers in 2003	0	52,387.54	568.396	3,303.801
N. of equivalent pages in 2003	0	333.210	1.1000	7.216
Mean equiv. pages in other publishers in 2003	0	31.537	1.067	2.732
Variance in equiv. pages in other publishers in 2003	0	4,531.227	43.704	274.682
Covers (yes/no)	0	1	0.02	0.143
N. of fashion shows in 2002-2003	0	16	1.171	2.725
Advertising pages in 2002	0	172	0.7953	5.033
Δ Advertising 2002-03	-73	101	0.082	2.350
Turnover in 2002 (Euros)	0	1,922,570,000	66,219,000	148,074,685.20
Total assets in 2002 (Euros)	17,961	1,975,631,000	72,607,000	174,069,896.26
Number of employees in 2002	1	14,452	221.820	967.661
Return on Sales (ROS) in 2002	-0.628	0.491	0.033	0.103
Return on Equity (ROE) in 2002	-8.743	3.961	0.051	0.664
Company age in 2003	1	166	276.090	24.232

N = 35,793 cases (i.e., 291 companies \* 123 publishers)

Tables 5.3a and 5.3b present the results of the Ordinary Least Squares multiple regression analysis employed to test hypotheses H1-H3 for dependent variables “Number of product placements” and “equivalent number of pages”. It provides evidence of the effects of the independent variables on the quantity of media coverage the products of a focal fashion company receive<sup>2</sup>. Since some of the control variables are highly correlated (i.e., ROS and ROE; Turnover and Assets), they have not been

<sup>2</sup> Some of the dependent variables exhibit high levels of correlation among themselves (see again Appendix 5.4). To address the possibility of problems, I employed a procedure based on condition indices and eigenvalues (Kennedy, 1998) to detect multicollinearity (not reported here) that fortunately led to negative results.

employed together in order to avoid multicollinearity problems. Separate regressions (not reported here) showed that ROS is a “better” predictor than ROE as far as the total variance explained by the regression model is explained. The same is true with Turnover with respect to Assets. Model I includes only the control variables, model II adds the ‘number of fashion show’ variable, model III includes the “advertising” variables, and model IV also adds the variable capturing the influence of other journalists.

**Table 5.2 – Correlations between independent variables and their predictors**

Predictor	Number of placements in 2003	Equivalent number of pages	Placement in cover pages in 2003 (yes/no) +
N. of fashion shows in 2002-2003	0.219***	0.229***	.187***
Advertising pages in 2002	0.748***	0.744***	.419***
Δ Advertising 2002-03	0.122***	0.128***	.101***
Mean coverage in other publishers in 2003	0.344***	0.340***	.280-.283 ***
Variance in coverage in other publishers in 2003	0.232***	0.227***	.150-.142 ***
Turnover in 2002 (Euros)	0.079***	0.060***	.040***
Total assets in 2002 (Euros)	0.082***	0.066***	.043***
Number of employees in 2002	0.007	0.006	.000
Return on Sales (ROS) in 2002	0.032***	0.031***	.020***
Return on Equity (ROE) in 2002	0.014*	0.014*	.012***
Company age in 2002	-0.019**	-0.017**	.000

\*\*\*  $p < .001$ ; \*\*  $p < .01$ ; \*  $p < .05$

+ The double value for mean coverage and variance in coverage refers to the two measures of the variables (i.e., number of placements and number of equivalent pages)

Since the two dependent variables, “Number of product placements” and “Equivalent number of pages” are highly correlated, unsurprisingly the Ordinary least squares estimates of the model estimates are quite similar in terms of magnitude, sign, and level of significance, with a few exceptions referred to control variables only. The full model containing all predictors has an R square of around 0.56 in both cases. This indicator may be interpreted as the proportion of the variance in the dependent variable explained by the model; thus, the model explains approximately 56% of the variance in publisher coverage of companies’ products, which is relatively high. For both dependent

variables, each additional set of predictors increased the overall model's R square. More in detail, control variables only explain a limited proportion of the variance of the two dependent variables (i.e., approximately 1%). The larger increase in R squares occurs with Model III, that adds the variables capturing the force of the "rule of reciprocity" that favors the coverage of advertisers' products.

**Table 5.3a – Effect of variables on media coverage in 2003**  
(Dependent variable: N. of product placements)

Variable	Model I	Model II	Model III	Model IV
Intercept	3.288*** (.232)	.960*** (.234)	-.150 (.164)	-.318 (.163)
Turnover in 2002	2.950E-08*** (.000)	2.235E-08*** (.000)	5.403E-08*** (.000)	-2.579E-09 (.000)
ROS in 2002	2.793* (1.414)	8.118*** (1.385)	1.936* (.969)	-1.114 (.957)
N. of employees in 2002	-3.516E-05 (.000)	4.084E-07 (.000)	1.821E-04 (.000)	1.819E-04* (.000)
Company age in 2002	-4.715E-02*** (.007)	-2.962E-02*** (.007)	-1.267E-02* (.005)	-3.673E-03 (.005)
N. of fashion shows in 2002-03	-	1.994*** (.054)	1.136*** (.038)	.379*** (.045)
Advertising pages in 2002	-	-	3.593*** (.023)	3.471*** (.023)
Δ Advertising 2002-03	-	-	2.466*** (.043)	2.348*** (.042)
Mean placements in other publishers in 2003	-	-	-	.338*** (.016)
Variance in placements in other publishers in 2003	-	-	-	2.858E-04*** (.000)
<i>R square</i>	.012	.062	.541	.557
<i>Δ R squared over previous model</i>	-	.050***	.479***	.016***

Standard errors in parentheses

\*\*\*  $p < .001$ ; \*\*  $p < .01$ ; \*  $p < .05$

**Table 5.3b – Effect of variables on media coverage in 2003**

(Dependent variable: N. of equivalent pages)

Variable	Model I	Model II	Model III	Model IV
Intercept	.803*** (.064)	.139* (.065)	-.165* (.046)	-.163* (.045)
Turnover in 2002	7.607E-09*** (.000)	5.566E-09*** (.000)	8.765E-10* (.000)	-1.101E-09** (.000)
ROS in 2002	.779* (.384)	2.298*** (.384)	.573* (.269)	-.297 (.264)
N. of employees in 2002	-1.574E-05 (.000)	-5.596E-06 (.000)	4.484E-05 (.000)	4.730E-05 (.000)
Company age in 2002	-1.126E-02*** (.002)	-6.262E-03 (.002)	-1.604E-03 (.001)	6.882E-05 (.001)
N. of fashion shows in 2002-03	-	.569*** (.015)	.331*** (.011)	.116*** (.013)
Advertising pages in 2002	-	-	.987*** (.006)	.956*** (.006)
Δ Advertising 2002-03	-	-	.728*** (.012)	.697*** (.012)
Mean equivalent pages in other publishers in 2003	-	-	-	.330*** (.016)
Variance in equivalent pages in other publishers in 2003	-	-	-	1.014E-03*** (.012)
<i>R squared</i>	.010	.063	.540	.555
Δ <i>R squared over previous model</i>	-	.053***	.477***	.015***

Standard errors in parentheses  
 \*\*\* p < .001; \*\* p < .01; \* p < .05

As a whole, the OLS parameter estimates are support the hypotheses H1-H3. “Number of fashion shows”, “Advertising pages”, “Δ Advertising”, “Mean coverage” and “Variance in coverage” are all statistically significant ( $p > .001$ ) and contribute to the overall model R square. Advertising is predictor with larger magnitude ( $\beta = 3.471 / 0.956$ ,  $p < 0.001$ ). This means that the planning of an additional page of advertising in a publisher’s portfolio of magazines in 2002 leads to an additional 3.471 product placements (0.956 equivalent pages) in 2003. The rule of reciprocity, indeed, appears to be a reality in the sample examined: advertisers do receive a favorable treatment. Moreover, it appears that publishers are sensitive to yearly changes in the media

planning of their advertisers: the impact of one more (less) advertising page is estimated in 2.3 more (less) product placements in services, for an equivalent of approximately 0.67 pages. The influence of other journalists, as measured by coverage of other publishers, also appears to be a significant source of influence of a focal publisher coverage decisions: companies whose products are well-covered, all else being equal, enjoy a greater visibility in a focal publishers' magazines. Further, variance in coverage among publishers within the same country increase, all else being equal, the coverage a company receives in a focal publishers. As hypothesized, publishers try to look different in the eyes of their readers; thus, journalists are "hungry for novelties" and, when possible, select products that differ from those published by their colleagues.

The effect of "fashion shows", although significant, is not as high in magnitude as expected: from a first reading of the OLS coefficients estimated by Model IV, it seems that an additional page of advertising leads to a greater increase in magazine coverage than staging an additional fashion show. This conclusion is counterintuitive, and most fashion communication managers would not agree. A possible explanation may be offered by considering the high level of correlation between "Number of fashion shows" and both "mean coverage" and "variance in coverage". This suggests that this variable may influence the visibility a company receives in fashion services both directly, and indirectly through peer pressures. Finally, it is worth noting that the most innovative companies in the fashion industry, i.e., the symbolic leaders that present their collections during Fashion Weeks (and are promptly imitated by less reputed producers), are on average smaller, younger, and less profitable (to the extent that in some cases they have average *negative* returns on sales or equity), as shown in the following Table 5.5. The lack of significance of control variables may be (at least partly) due to this reason.

Tables 5.4 reports the results of the logistic regression analysis employed to hypotheses H1-H3 in the case of the dummy dependent variable "placement in cover pages". Since, arguably, coverage inside magazines is a predictor of cover content, the variable "equivalent number of pages" was included in the predictor list. Also in this

case, all hypotheses are supported. Although the B coefficients estimated by the model are of less intuitive interpretation than the  $\beta$  coefficients of regression analyses, the odd multipliers reported in the 'exp (B)' column lend themselves to a more intuitive appreciation of their meaning.

**Table 5.4 – Effect of variables on media coverage in 2003  $\beta$**   
(Dummy dependent variable: Placement in cover pages)

<b>Variable</b>	<b>B</b>	<b>Standard Errors</b>	<b>Exp (B)</b>
Intercept	-5.189***	.118	.006
Coverage in 2003 (N. of equivalent pages)	.169***	.009	1.184
Turnover in 2002	.000*	.000	1.000
ROS in 2002	-1.393	.599	.248
N. of employees in 2002	.000*	.000	1.000
Company age in 2002	.004	.003	1.004
N. of fashion shows in 2002-03	.042*	.020	1.043
Advertising pages in 2002	.019*	.008	1.019
$\Delta$ Advertising 2002-03	.041**	.013	1.042
Mean equivalent pages in other publishers in 2003	.120***	.017	1.127
Variance in equivalent pages in other publishers in 2003	.000**	.000	1.000
<i>-2 Log likelihood</i>		2,741.266	
$\chi^2 (10)$		1,803.887	
<i>Cox &amp; Snell R Square</i>		.068	
<i>Nagelkerke R Square</i>		.418	

\*\*\* p < .001; \*\* p < .01; \* p < .05

More precisely, these parameters may be interpreted as the contribution of each variable to the odds of obtaining a placement in the cover page. Values greater than 1 indicate that the variable in question increases the odds of obtaining cover placements, while values between 0 and 1 indicate a decrease in the odds. Thus, for example, each additional equivalent page of product placements into the publishers' services leads to about 18,4% increase in the odds of obtaining at least a cover; each additional fashion

show leads to an increase of about 4.3%; and so forth. A look at the relative magnitude of these parameters shows that peer pressures are an issue also as far as covers are concerned. Moreover, it seems that the increase in advertising (rather than its absolute level in the previous year) has a greater impact on the odds of receiving a cover placement: publisher may reward with covers those companies that increase their commitment with a publisher. Thus, somewhat different "rules of the game" seem to apply as far as placement in cover pages is concerned.

*b. the impact of collection evaluation*

As previously noted, data for collection evaluations were available for a more limited number of companies, i.e., those that present their collections in the context of Fashion Week. Hypothesis H4, thus, that predicts that better evaluation of a company's collection leads to a greater coverage of its products in fashion services, will be tested with reference to a sub-sample of 6,273 cases, i.e., 51 companies \* 123 publishers. Table 5.5 reports descriptive statistics for this sub-sample. On average, these companies are smaller, younger, with a minor number of employees, and less profitable (as shown by the *negative* mean ROS and ROE values). Moreover, they tend to receive a greater media coverage with respect to all measures considered (i.e., number of placements, equivalent number of pages, placements in cover pages). As in the case of security analysts (see paragraphs 2.2.3 and 2.2.4), fashion editors' evaluation of new collections, as evident in the reviews published by MF Fashion, tend to be positively biased. Both measures of collection evaluation have in fact a positive mean and their distribution is positively skewed; moreover in both cases, the theoretical minimum (i.e., -2 or -1) was attributed to no observation. Possibly, there is a gap between "real" opinions and those expressed in written reviews: on this, Shrum (1991) observed a similar phenomenon in the case of theatre critics, and during my preliminary study I also found anecdotal evidence of the fact that collection disliked by fashion editors obtain instead favorable reviews.

**Table 5.5 – Descriptive statistics for sub-sample**

<b>Variable</b>	<b>min.</b>	<b>max.</b>	<b>mean</b>	<b>Std. deviation</b>
N. of placements in 2003	0	1,078	11.831	50.121
Mean placements in other publishers in 2003	0	101.88	11.462	17.119
Variance in placements in other publishers in 2003	0	52,387.54	2,179.106	7,184.926
N. of equivalent pages in 2003	0	333.210	3.2676	14.453
Mean equiv. pages in other publishers in 2003	0	29.070	3.166	4.794
Variance in equiv. pages in other publishers in 2003	0	4,531.227	182.561	607.089
Covers (yes/no)	0	1	0.06	0.231
N. of fashion shows in 2002-2003	0	16	4.340	2.372
Mean collection evaluation	-1	2	.722	.631
Mean collection evaluation (coefficient of imbalance)	-.22	1	.485	.324
Advertising pages in 2002	0	153	1.768	8.285
Δ Advertising 2002-03	-62	56	0.055	2.880
Turnover in 2002 (Euros)	0	302,132,000	45,981,902	63,885,113
Total assets in 2002 (Euros)	711.619	807,101,000	70,708.552	131,298,661
Number of employees in 2002	1	1,054	171.119	205.733
Return on Sales (ROS) in 2002	-0.628	0.491	-0.010	.191
Return on Equity (ROE) in 2002	-8.743	3.961	-0.064	1.562
Company age in 2003	2	39	18.150	10.584

N = 6,273 cases (i.e., 51 companies \* 123 publishers)

The correlation matrix for the above variables is reported in Appendix 5.6. The two measures of collection appreciation are unsurprisingly highly correlated ( $r = .805$ ,  $p < 0.001$ ). As a whole, the sub-set of the database has a similar structure of the complete one as far as correlations among variable are concerned, with some minor changes. ‘Number of Employees’ is highly correlated to both ‘Turnover’ and ‘Assets’ ( $r$  is equal to .831 and .903, respectively,  $p < .001$ ). ‘Company age’ is now positively correlated to all measures of coverage. Table 5.6 reports a subset of the correlation matrix. As in the previous Table 5.2, the variables considered for hypotheses H1-H3 are all highly correlated in a statistically significant way, and the same is true for hypothesis H4.



**Table 5.6 – Correlations between independent variables and their predictors**

Predictor	Number of placements in 2003	Equivalent number of pages	Placement in cover pages in 2003 (yes/no) +
N. of fashion shows in 2002-2003	0.172***	0.174***	.174***
Mean collection evaluation	.066***	.069***	.071***
Mean collection evaluation (coefficient of imbalance)	.061***	.063***	.073***
Advertising pages in 2002	0.813***	0.821***	.463***
Δ Advertising 2002-03	0.056***	0.073***	.090***
Mean coverage in other publishers in 2003	0.293***	0.284***	.278-.284 ***
Variance in coverage in other publishers in 2003	0.206***	0.197***	.143-.138 ***
Turnover in 2002 (Euros)	0.166***	0.164***	.158***
Total assets in 2002 (Euros)	0.133***	0.133***	.120***
Number of employees in 2002	0.118***	0.117***	0.118***
Return on Sales (ROS) in 2002	0.063***	0.062***	.059***
Return on Equity (ROE) in 2002	0.025	0.024	.026
Company age in 2002	0.039*	0.047**	0.053**

\*\*\* p < .001; \*\* p < .01; \* p < .05

+ The double value for mean coverage and variance in coverage refers to the two measures of the variables (i.e., number of placements and number of equivalent pages)

Tables 5.7a and 5.7b present the results of the OLS regression analysis employed to test hypotheses H1-H4 for dependent variables “Number of product placements” and “equivalent number of pages”. As done in the full sample analysis, ROE and Assets were dropped from the model for their high level of correlation with, respectively, ROS and Turnover. For the same reason, only one of the two measures of collection evaluation was employed: the coefficient of imbalance was preferred because it contributes most to the model overall R square. Further, in this case multicollinearity diagnosis procedures highlighted problems with the variable ‘Number of Employees’, which is greatly correlated with Turnover and was dropped, too, as a consequence. The succession of models proposed in Tables 5.7a and 5.7b is as follows: Model I includes the control variables only, model II adds ‘Number of fashion show’, model III, ‘Collection evaluation’; Model IV, the “advertising” variables; and model IV finally adds the variable capturing the influence of other journalists. The overall model’s R

square is 0.667-0.688, that means that more than two thirds in the variance of the dependent variables are explained by the set of predictors employed.

**Table 5.7a – Effect of variables on media coverage in 2003**  
(Dependent variable: N. of product placements)

Variable	Model I	Model II	Model III	Model IV	Model IV
Intercept	2.446 (1.720)	-7.623*** (2.148)	-9.660*** (2.224)	-5.273*** (1.352)	-1.370 (1.365)
Turnover in 2002	1.326E-07*** (.000)	1.230E-07*** (.000)	1.228E-07*** (.000)	2.427E-08*** (.000)	-1.932E-08* (.000)
ROS in 2002	.123* (.149)	.102* (.049)	.102* (.049)	7.682E-03 (.030)	-2.926E-02 (.029)
Company age in 2002	.201** (.078)	3.801E-02 (.081)	5.302E-02 (.081)	-3.628E-02 (.049)	-6.401E-02 (.048)
N. of fashion shows in 2002-03	-	3.354*** (.434)	2.823*** (.460)	1.767*** (.279)	.781** (.288)
Mean collection evaluation (coefficient of imbalance)	-	-	10.368** (2.991)	1.222 (1.813)	-2.095 (1.808)
Advertising pages in 2002	-	-	-	5.489*** (.068)	5.393*** (.067)
Δ Advertising 2002-03	-	-	-	2.807*** (.168)	2.845*** (.166)
Mean placements in other publishers in 2003	-	-	-	-	.265*** (.045)
Variance in placements in other publishers in 2003	-	-	-	-	3.454E-04*** (.055)
<i>R square</i>	.034	.049	.052	.654	.667
<i>Δ R squared over previous model</i>	-	.015***	.003**	.0601***	.013***

Standard errors in parentheses

\*\*\* p < .001; \*\* p < .01; \* p < .05

Table 5.7b – Effect of variables on media coverage in 2003

(Dependent variable: N. of equivalent pages)

Variable	Model I	Model II	Model III	Model IV	Model IV
Intercept	.405 (.602)	2.285*** (.602)	-2.867*** (.623)	-1.531*** (.366)	-.441 (.371)
Turnover in 2002	3.607E-08*** (.000)	3.351E-08*** (.000)	3.345E-08*** (.000)	5.564E-09** (.000)	-5.821E-09* (.000)
ROS in 2002	2.432E-02* (.014)	2.858E-02* (.014)	2.870E-02* (.014)	1.572E-03 (.008)	-8.296E-03 (.008)
Company age in 2002	6.797E-0**2 (.022)	2.434E-02 (.023)	2.863E-02 (.023)	1.425E-03 (.013)	-1.089E-02 (.013)
N. of fashion shows in 2002-03	-	.896*** (.122)	.744*** (.129)	.428*** (.076)	.192* (.078)
Mean collection evaluation (coefficient of imbalance)	-	-	2.965*** (.838)	.325 (.491)	-.563 (.491)
Advertising pages in 2002	-	-	-	1.656*** (.018)	1.542*** (.018)
Δ Advertising 2002-03	-	-	-	.914*** (.046)	.922*** (.045)
Mean placements in other publishers in 2003	-	-	-	-	.224*** (.044)
Variance in placements in other publishers in 2003	-	-	-	-	1.357E-03*** (.000)
R square	.034	.047	.050	.676	.688
Δ R squared over previous model	-	.014***	.003***	.0626***	.011***

Standard errors in parentheses

\*\*\* p < .001; \*\* p < .01; \* p < .05

Although the R square for the sub-sample composed of these highly reputed companies is greater than in the case of the full sample (see Tables 5.3a-5.3b), this is not a consequence of the new variable introduced in the model. In fact, 'Collection evaluation' contribute in a modest manner to the model's goodness-of-fit, and its significance is "crowded out" as more predictors are added in the model. Thus, while hypotheses H1-H3 are still confirmed in this sub-sample, H4 has to be rejected. This finding however greatly contrasts with the results of the preliminary study, that

suggested that “the product” and its newsworthiness is a major determinant of magazine coverage. Possible explanations for the lack of significance of the measure of collection appreciation I employed may include: the fact that written reviews may perhaps not reflect fashion editors’ “real opinions”; differences between editors and stylists in the elements employed to assess newsworthiness; and the fact that collection reviews are written immediately after collection presentations, i.e., many months in advance of the moment when fashion services are realized. Thus, appreciation of a company’s collection may mature over time, as journalists compare it with those of competitors and refine their judgments. Thus, although H4 was not confirmed, the impact of “the product” remains an open question.

Table 5.8 reports the results of the logistic regression analysis used to test hypotheses H1-H4 in the case of the dummy variable “placement in cover pages”. Results are quite similar to those reported in table 5.4 for the full sample. Again, H4 is not supported. Moreover, also H2a is not supported: the absolute level in the previous year advertising budget does not significantly increase the odds of obtaining at least one placement in cover pages. On the other hand, the exp (B) coefficient for ‘ $\Delta$  Advertising’ is greater than in the full sample analysis. The idea that placements in covers are employed by publishers as a means to reward those advertisers that increase their publisher-specific advertising investments is thus strengthened.

### *c. National and individual differences among publishers*

The research design of the quantitative study here reported permitted to explore patterns of national and individual variation among publishers. Table 5.8 shows the results of separate multiple linear regression analyses I run in order to explore national variations. The dependent variable is ‘equivalent number of pages’; results in the case of the other dependent variables are quite similar, and were omitted in order to simplify the presentation. As far as ‘number of fashion shows’ is concerned, Italian (understandably) and German publishers are the most reactive to Italian companies presentation of collections in the context of Fashion Weeks. The effect of fashion shows in the case of

French and UK publishers, although significant, is much smaller in magnitude. This may perhaps be due to the fact that the vast majority of Italian companies present their collections during Milan Fashion Week, and that both France and the United Kingdom are “high fashion” countries and host on their own “primary circuit” Fashion Weeks. Thus, journalists working in these countries, as a whole, may be unimpressed by the upper segment of the Italian fashion market. In the case of USA publishers, moreover, the number of fashion shows does not significantly impact visibility. The lack of an international sample of companies does not permit however further exploration of country-of-origin effects in this context.

**Table 5.8 – Effect of variables on media coverage in 2003  $\beta$**   
(Dummy dependent variable: Placement in cover pages)

Variable	B	Standard Errors	Exp (B)
Intercept	-4.600***	.299	.010
Coverage in 2003 (N. of equivalent pages)	.123***	.015	1.131
Turnover in 2002	.000	.000	1.000
ROS in 2002	.001	.007	1.001
Company age in 2002	.008	.009	1.008
N. of fashion shows in 2002-03	-.008	.053	.992
Mean collection evaluation (coefficient of imbalance)	.485	.355	1.625
Advertising pages in 2002	.013	.017	1.013
$\Delta$ Advertising 2002-03	.106***	.025	1.112
Mean equivalent pages in other publishers in 2003	.077***	.019	1.080
Variance in equivalent pages in other publishers in 2003	.000**	.000	1.000
<i>-2 Log likelihood</i>		909.374	
$\chi^2 (10)$		659,089	
<i>Cox &amp; Snell R Square</i>		.159	
<i>Nagelkerke R Square</i>		.471	

\*\*\*  $p < .001$ ; \*\*  $p < .01$ ; \*  $p < .05$

**Table 5.9 – National differences in the effect of variables on media coverage  
(Dependent variable: N. of pages equivalent) <sup>+</sup>**

<b>Variable</b>	<b>Italy</b>	<b>France</b>	<b>Germany</b>	<b>UK</b>	<b>USA</b>
N. of fashion shows in 2002-03	.196*** (.028)	4.547E-02* (.023)	.148*** (.018)	9.781E-02*** (.020)	2.489E-02 (.022)
Advertising pages in 2002	1.048*** (.009)	.996*** (.021)	.889*** (.017)	.706*** (.014)	.547*** (.013)
Δ Advertising 2002-03	.760*** (.017)	.597*** (.039)	.715*** (.031)	.702*** (.029)	.235*** (.030)
Mean placements in other publishers in 2003	.140** (.051)	.322*** (.047)	.625*** (.039)	.338*** (.041)	.796 (.064)
Variance in placements in other publishers in 2003	1.556E-03*** (.000)	5.863E-03*** (.001)	-1.081E-02*** (.002)	7.168E-03*** (.002)	-1.112E-02*** (.003)
<i>R squared</i>	.543	.662	.683	.695	.589

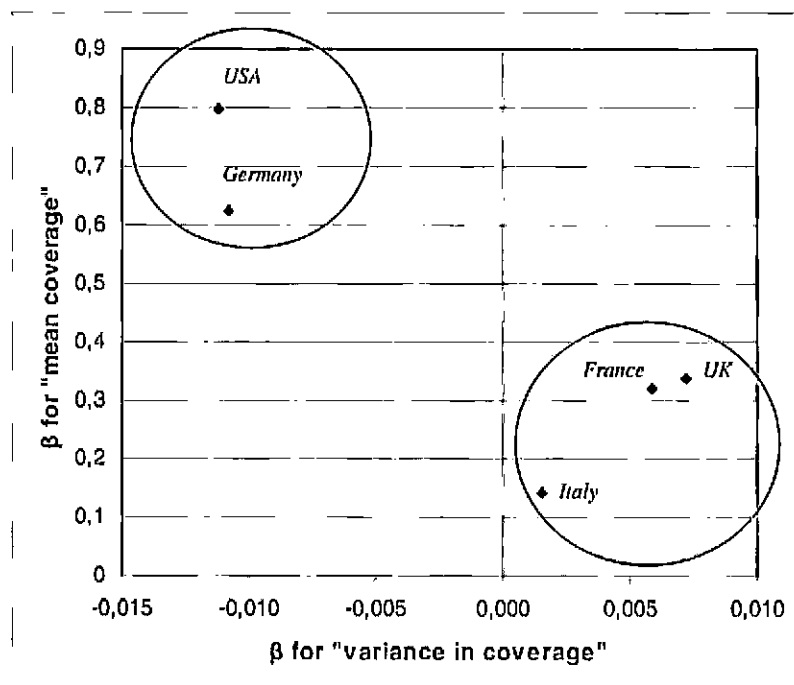
<sup>+</sup> Control variables (mostly non significant) were omitted to increase readability.

As far as advertising is concerned, in all the countries investigated the "rule of reciprocity" that prescribe a favorable treatment of advertisers is enforced. Yet, when the magnitude of the beta coefficients are considered, remarkable differences emerge. Italian advertisers that invest their promotional budget in their home country receive a much greater visibility than in USA. This datum may reflect a greater possibility to control and manage a relationship with publishers within the boundaries of the home nation, but other factors may play a role. During my preliminary study, publishers noted that the competitive environment of the Italian magazine publishing industry has long been more crowded than abroad, and the "rule of reciprocity" has developed as a consequence, in order to stimulate advertising investments. The more recent diffusion of the rule in other countries echoes in the words employed by the communication manager of a company with a multinational presence, who commented the situation by suggesting that "we used to say that the other countries were different, but nowadays not anymore... All the world is the same".

Finally, as far as peer pressures are concerned, the countries examined show rather differentiated patterns, as graphically represented in Picture 5.2. In USA and

Germany, product coverage in other publishers has a relatively sizeable effect; moreover, the impact of variance on coverage is negative: this means that lack of consensus among journalists leads to a reduced coverage (a “liability of uncertainty”). On the other hand, in Italy, France and UK (again, “high fashion” countries), the effect of mean coverage is smaller, and the impact of variance is positive: thus, lack of consensus among journalists leads to an increased coverage as magazines attempt to “look different” from their competitors in the eyes of readers.

**Picture 5.2 – Patterns of national variation among publishers:  
The impact of peer pressure**



In addition to national differences, I also explored individual variations among publishers. This makes sense, since publishers are not equals: in some cases, the fashion industry represents the majority of their advertising revenue while in other cases they attract investments from a more various mix of industries; they also differ as far as audience preferences are concerned (i.e., exclusive vs. “popular” fashion); moreover, the most prestigious publishers (e.g., Condé Nast) could be less strictly bounded by the “rule of reciprocity”. Separate regressions for each publisher were realized, resulting in individual differences as far as significance and relative magnitude of parameter

estimates. Results of these analyses are not here reported, since they are of difficult interpretation without background knowledge about publisher history, organizational structure, magazine portfolio, and target readership. Table 5.10 however reports parameter estimates of the impact of variables on media coverage in a selection of Italian publishers, those that concentrate most of the fashion advertising investments in Italy. As a whole, for all these publishers, that are heavily dependent from fashion companies for their profitability, the variables included in the model explain more than 90% of the variance in media coverage, i.e., much more than on average. Yet significant differences exist in the relative predictive value of each of the variables. Curiously, in the case of Condé Nast Italy, which is the “prestige” publisher of the Italian editions of Vogue, Glamour, GQ, “fashion shows” is not significantly related to product coverage in fashion services. But a detailed discussion of these differences is beyond the purposes of the present dissertation, since it would require further investigation. Fine-grained analyses, at the individual magazine level, and also considering the specific content of placements, rather than the quantity of coverage, may shed light on these differences.

**Table 5.10 – Individual differences in the effect of predictor on magazine coverage in selected Italian Publishers (Dependent variable: N. of pages equivalent) <sup>+</sup>**

<b>Variable</b>	<b>Condé Nast Italy</b>	<b>Mondadori</b>	<b>RCS Periodici</b>	<b>Hachette Rusconi</b>	<b>Gruppo Editoriale L'Espresso</b>
<b>N. of fashion shows in 2002-03</b>	n.s.	1.192*** (.314)	1.143*** (.235)	.570*** (.258)	.223* (.093)
<b>Advertising pages in 2002</b>	.452*** (.040)	.134** (.045)	.147*** (.034)	.372*** (.053)	.144*** (.019)
<b>Δ Advertising in 2002-03</b>	.357*** (.072)	.131** (.046)	n.s.	.369*** (.074)	.191*** (.029)
<b>Mean placements in other publishers in 2003</b>	6.772** (.911)	11.347*** (.751)	8.132*** (.631)	8.268*** (.669)	2.555*** (.207)
<b>Variance in placements in other publishers in 2003</b>	5.860E-02*** (.005)	n.s.	5.559E-02*** (.003)	n.s.	n.s.
<b>R squared</b>	.936	.911	.967	.920	.918
<b>Fashion advertising pages in 2002</b>	8,882	7,947.50	7,432	4,919	4,322

<sup>+</sup> Control variables (mostly non significant) were omitted to increase readability.



#### 5.4. Discussion

Product placements in fashion services are influenced by many factors. In my preliminary study, I identified some possible determinants of coverage: companies' public relations efforts and "insertion" pressures; publishers' dependence from advertising revenues for profitability; professional norms stressing newsworthiness as a criterion for selection decisions; individual journalists' propensity to "look at each other". In this chapter, I reported the results of the quantitative study I conducted in order to explore the relative impact of some of these determinants. More precisely, my research findings were as follows.

*Advertising* is the most "predictive" indicator of magazine coverage, the one that contributes the most to explain variance in a focal publisher's coverage of a given company's products. Thus, those companies that lack sizeable promotional budget are unlikely to have their products selected for large numbers of fashion services. Moreover, publishers are also "reactive" to decrease or increase in advertising from one year to the other, and are likely to "reward" those companies which increase the more their media planning with cover page visibility. The issue is sensitive because of deontological implication; although in the confidentiality of interviews it is often disclosed, the existence of the rule of reciprocity is in fact often denied in public. For example, a recent article published by a leading Italian newspaper targeting the fashion industry (*MF Fashion*, 2004) opens with the following comment: "Editorial content sold in exchange for a massive media planning? *Pas du tout*. The unwritten rule 'so much advertising investments, so much services' is often proven to be wrong by data"<sup>3</sup>. Yet, according to the results of my study, although exceptions are possible and worth investigation, as a general rule advertising matters to a great extent. The lack of a "public interest" orientation in fashion journalism, in other words, created fertile ground for the emergence and institutionalization of the rule of reciprocity that prescribes that advertisers will receive a favorable treatment.

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<sup>3</sup> Originally in Italian.

The finding that “advertising matters” is consistent with common themes in opinion maker literature, where “conflict of interests” were often noted in various context. In the context of specialized journalists, however, to the best of my knowledge my study is the only that has investigated with econometric modeling this issue, since other studies have typically relied on survey of journalists or qualitative interviews. Yet, as nicely put by Hayward & Boeker (2001), “[c]onflicts of interest are difficult to observe firsthand ...and may be so well entrenched as to form part of practical rather than discursive consciousness”. Thus, although generally low in managerial implications, this finding has some value. Of more interest for fashion managers is the fact that variations exist among companies in the “exchange ratio” between advertising pages and product coverage. During my preliminary study, I was often told that the “unwritten” rule of reciprocity prescribes approximately 1 equivalent page of product placements in exchange for 1 page of advertising. This appears to be true on average, yet even when advertising is taken into consideration, there is enough variability in product coverage to suggest that other factors may play a significant role in fashion journalists’ selection choices.

*Number of fashion shows* was found to be a significant predictor of product coverage, yet its effect is smaller in magnitude than expected. Thus, if we consider for example the parameters estimated by the model reported in Table 3.b, we discover that each additional fashion show leads to an increase in product coverage of just 0.116, i.e., a little more than 1/10 of page. Yet, fashion shows exert their influence not only over a focal publisher, but also over all the others. It was previously noted that the number of fashion shows staged is highly correlated with both “mean coverage” by other publishers and “variance in coverage”. This suggests the possibility that this variable may influence product coverage also indirectly, through the mediated influence of other publishers. Since regression analyses are not able to track these recursive effect, we must conclude that the OLS estimators downplay the importance of fashion shows.

*Collection evaluation* by journalists, surprisingly, was not found to affect the quantity of coverage a company receives. This finding is counterintuitive and contrasts with the results of my preliminary study. As previously noted, however, the lack of significant effects is probably due to problems in the operationalization of the construct. Written reviews may be a distorted mirror of real opinions; editors, "those who write"; could appreciate different elements of fashion products respect to stylists, "those who communicate with images"; finally, written reviews are written much before product selection for fashion services begins. Yet, although I was aware of some of these limitations when decided to start the lengthy content-analysis procedure that led to obtain my two indicators of collection evaluation, I thought that an imprecise indicator would have been better than no indicators at all. Future attempts to capture collection evaluation will probably have to rely on data collections from stylists involved in selection decisions in moments contiguous to service realization.

*Influence of other journalists*, as measured by mean coverage and variance in coverage among publishers within the same country, was found to be a significant and substantial predictor of media coverage. The fact that opinion makers tend to look at each other is a common theme highlighted by different scholars in the case of arts critics, security analysts, and specialized journalists. Patterns of reciprocal influence among workers belonging to the same occupational community but belonging to different organizations were also noted by sociologists of professions. During my preliminary study, I was confronted many time with the fact that "fashion journalists are a rather cohesive caste". When I operationalized the construct, I was inspired by Hayward & Boeker (2001), that employed mean rating and variance of rating to control for the social and normative influence of colleagues on focal security analysts ratings. My results are similar to theirs, in that both variables are significant predictors of coverage. Thus, also in this case, "interpretation is a social enterprise, carried out with an eye to how others will come to view the same information" (Zuckerman, 1999: 1411-2).

The fine-grained analyses regarding national "clusters" revealed that in some countries (i.e., USA, Germany) peer pressures tend to be relatively strong and uniformity of judgments (i.e., low variance) leads to a greater visibility. In other countries, (i.e., Italy, France, Germany), peer pressures tend to exert a reduced influence, and uniformity of judgments leads to a *lower* visibility. Individual differences among publishers go in the same direction. Since peer pressures lead to conformity (a theme which is at the core of neo-institutional theory), companies that propose innovative fashion, that challenges the established rules of the field, will encounter lower barriers to media access in the case of publishers of this second typology. These publishers will be inclined to explore novelties in their attempt to "look different" from competitors, thus generating a visibility "niche" for unconventional companies. "Conformist" publishers, on the other hand, will prefer to cover more mainstream fashion. Their selection decision will thus favor established companies rather than new entrants.

That said, while the results of the present study may help both media planning and publicity strategy, it has several limitations. Firstly, an alternative structure of the data gathering process for dependent variable could have led to somewhat different results. For example, I employed annual measures of visibility while in fashion new collections are launched on a biannual basis. Moreover, my unit of analysis was the dyad company-publisher; one of the possible alternatives, the dyad company-magazine, could have permitted more detailed analyses. Secondly, I managed to gather data referred to Italian companies only. This limited the possibility to explore countries-of-origin effects. Thirdly, the dependent variables I gathered disregard some of the possible determinants of media coverage. For example, "collection evaluation" proved to be a poor indicator of product newsworthiness. Further, no measure of public relation efforts or company-journalist relationships were available to include, as this would have required primary data and limited greatly the sample size. Finally, as far as the dependent variables are considered, I focused on quantitative and measurable aspects, and neglected qualitative aspects that, although equally important to convey brand image, are hard to measure, particularly for extended samples.

In spite of these limitations, this study is a first attempt to adopt a “supply-side” approach in the marketing scholarship regarding opinion makers and provides some evidence of the relative importance of some predictors of product coverage. Moreover, aware of its limitation, I decided to continue my investigations with a follow-up study, based on a multiple-case study approach, where I contrast best and worst covered companies in order document best practices in the field.

*Appendix 5.1. Publishers included in the sample*

<b>Country</b>	<b>Publisher</b>
Italy	Alberto Peruzzo Editore; Argo Editore, B-Arts srl; Chronomedia Editore; Class Editori; Condé Nast Italia; Conti Editore Spa; DARP – RCS Periodici; Didieffe; Dogma srl; Edizioni Il Sole 24Ore; Edit srl; Editoriale Domus; Editoriale Moda; Editrice La Stampa; Editrice Quadratum; Edizioni Cioè; Edizioni Ecomarket; Edizioni PEM; Edizioni Raffi; Edizioni Swan Group; Eva Quirrenbach; Fabiano srl; Giorgio Mondadori; Gruner + Jahr / Mondadori; Gruppo Editoriale Futura; Gruppo Editoriale L'Espresso; Hachette Rusconi; Hearst Mondadori Editoriale; Kiss Me!; L'Altrostudio; Logos; Magnum Editore; Mondadori; Optoservice srl; Ottica Rainbow srl; P.S.C.; Periodici S. Paolo; Piscopo Editore; Professionali srl; Publfashion; RCS Periodici; Sallorenzo Editore; Sfera Editore; Società Edizioni e Pubblicazioni; Società Editoriale Quotidiani; Società Europea di Edizioni; Sonora; Soprattutto Editore; Studio Zeta; Swam Group Spa; Target L/A Editore; Today; Tre D Editoriale; Today; Tre D Editoriale; Uniline; Uniservice; Unistar srl; Ventisei Editrice; World Servizi Editoriali; Zanfi Editore.
France	Axel Springer France; BMJ Ltd; Condé Nast France; EDI-SIC; Editions Jalou; Emap Metro France; Excelsior Publications; Groupe Express-Expansion; Hachette Filipacchi Media France; Hearst France; Marie Claire Album SA; Numéro Press SA; Purple Institute; Quebecor Hellemme; Upstreet International.
Germany	Amica Verlag; Axel Springer Germany; Burda Verlag; Condé Nast Germany; Deutscher Fachverlag GmbH; Emap Elan Germany; Emap Metro Germany; Gruner + Jahr; Hachette Filipacchi Media Germany; Jahres Zeiten Verlag; Kid's Wear Publishing; Magazinepresse Verlag; Marquard Media AG; Max Verlag; Spread.
UK	Another Magazine Ltd; Beach Magazines and Publishing; Condé Nast UK; Dazed Group; Tennis Publication UK; Ed. Arminum; Emap Elan UK; Emap Metro UK; Hachette – Emap Magazines; Hearst UK; IPC Media; Level Print Ltd; National Magazines Inc; Northern & Shell PLC; Rodale Limited UK; Swinstead Publishing.
USA	Brant Publications Inc.; Condé Nast USA; Tennis Publication USA; Emap Metro USA; Fairchild; Flaunt Magazine; Hachette Filipacchi Media USA; Hearst USA; Paper Magazine; Rodale Limited USA; Selective Media; Surface Publishing; Time Inc.; V Magazine; Vibe/Spin Ventures; Fallace & April.

*Appendix 5.2. Companies included in the sample*

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3A Antonini; Acqua di Parma; adidas; Aeffe; Agnona; Aigner; Aimée Le Spose; Alcantara; Aldo Bruè; Alea; Alessandro Dell'Acqua; Alexander; Alias; Alpine Stars; Altea; Alviero Martini; Amina Rubinacci; Andrea Mabiani; Andrew MacKenzie; Angelo Marani; Annabella; Annapurna; Antonio Fusco; Arena; Artioli; Asics; Aspesi; Aureli Spa; Avirex; Baldinini; Baroni; BasicNet; Belfe; Belvest; Benetton; Biagiotti; Blufin; Blunaut; Bobo; Boglietti; Borgofiori; Borsalino; Bottega Veneta; Braccialini; Bric's; Brioni; Brunello Cucinelli; Bruno Magli; Bulgari; Burani; Byblos; Calvin Klein; Calzaturificio Zeis Excel; Calzedonia - Intimissimi; Canali; Cantarelli; Cappelletti; Carla Carini; Carlo Pignatelli; Carrel; Carrera; Casadei; Casucci; Cesare Paciotti; Champion; Chanel; Chantelle; Chervò; Chimento; Chopard; Ciesse; Ciocca; Cividini; Clothing Company; Coast Weber & Ahaus; Coats Cucirini; Coccinelle; Conbipel; Conte of Florence; Corneliani; Cosmopolitan; Cotonella; Cotton Club; CSP International; Dainese; Dalmine Uomo; Daniele Alessandrini; Danny Dailywear; Deborah; Delsey; Dépêche Mode; Diadora - Invicta; Diesel; Dino Erre; Dirk Bikkembergs; Divina; Dolce & Gabbana; Donna Karan; Donna Serena; Dubin; Einstein; EMI; Ermenegildo Zegna; Essenza; Etro; Extesa; Fabi; Fabiana Filippi; Fabrys; Facis; Fairly; Fashion Box; Fendi; Fila; Filatura Grignasco; Filodoro; Forall; Formula Sport Group; Fornari; Francesco Biasia; Franzoni; Fratelli Rossetti; Calzature Frau; Frette; Furla; Futuro; Fuzzi; Gabel; Gai Mattiolo; Gallo; Garda; Gas; Gattinoni; Genny Moda; Geox; Gianfranco Ferré; Gianna Meliani; Gilmar; Giorgio Armani; Giorgio Fabiani; Giorgio Grati; Glenfield; Golden Lady; Grisport; Gruppo Arce; Gruppo La Perla; Guess; Helmut Lang; Henriette; Hermès; Herno; Hettabretz; Hilton Vestimenta; Hugo Boss; I Pinco Pallino; Il Gufo; Imec; Infiore; Inghirami; Intai; Isaia; Ivy Oxford; Janet & Janet; Jil Sander; Kallisté; Klopman; Krizia; La Matta; La Rinascente; Laura Lindor; Le Full; Lea Foscati; Les Copains; Levante; Levi's; Liabel; Linclalor; Linea Marche; List; Liu Jo; Logan; Loro Piana; Lotto; Louis Vuitton; Luana; Lubiam; Luciano Barbera; Luciano Soprani; Luisa Spagnoli; Luxottica; Mabitex; Mabro; Mabrun; Maglificio Magir; Malerba; Marcolin; Maria di Ripabianca; Mario Valentino; Marly's; Marni; Marzotto; Maska; Massimo Rebecchi; Mavecon; Max Mara; Maxima; Mazzini; Meeting; Meltin' Pot; Mila Schon; Mirtillo; Missoni; Mistral; Monnalisa; Montegrappa; Morellato; Moreschi; Morgano; Moschino; Naf Naf; Nannini; Naturino; Natuzzi; Navigare; Nazareno Gabrielli; Nike; Olip Italia; Onyx; Paola Frani; Parah; Pepper Industries; Perfil; Petit Bateau; Phard; Piazza Sempione; Piquadro; Pollini; Pomellato; Pompea; Prada; Prandina; Premiata; Prenatal; Principe; Puma; Rebecca Moses; Reebok; Richemont; Rifle; Roberto Capucci; Roberto Cavalli; Romeo Gigli; Roncato; Ruco Line; Ruffo; Safilo; Salvatore Ferragamo; Samsonite; Sara Lee; Sasch; Sergio Rossi; Sergio Tacchini; Seven; Simod; Simonetta; Simultaneous; Siport; Sixty; Slam; Spazio Sci Fashion Group; Sportswear Company; Stefanel; Stonefly; Strenesse; Tecnica; Teddy; The Bridge; Tod's; Tomasoni Topsail; Tosca Blu; Trempe; Triumph; Trussardi; Valextra; Valleverde; VDP; Versace; Vicini; Vivienne Westwood; Wolford; Zucchi;

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*Appendix 5.3. Shrum's (1991) coding scheme*

The coding scheme employed by Shrum (1991) to generate a measure of review tenor in the case of theatre review was adapted as follows.

*(-2) Very negative*

- a. virtually all negative phrases / statements;
- b. reviewers clearly dislikes collection
- c. positive aspects unmentioned or minor

*(-1) Somewhat negative*

- a. negative statements dominate positive ones either by emphasis, placement (first or last), or quantity (more negative statement than positive), but still significant aspects are mentioned;
- b. mainly descriptive but some negative phrases

*(0) Neutral*

- a. descriptive (no evaluative statements), *or*
- b. equal emphasis on positive and negative aspects
- c. cannot tell whether reviewer appreciates the collection

*(+1) Somewhat positive*

- a. positive statements dominate negative ones either by emphasis, placement (first or last), or quantity (more positive statements than negative), but still significant negative aspects are mentioned
- b. mainly descriptive but some positive phrases

*(+1) Very positive*

- a. virtually all positive statements / phrases
- b. reviewer clearly likes collection
- c. negative aspects unmentioned or minor



*Appendix 5.4. The Janis-Fadner coefficient of imbalance*

This indicator was initially developed to analyze wartime propaganda, yet it has recently been employed by strategic management scholars (Pollock & Rindova, 2003; Deephouse, 2000) to “capture” the overall tenor of articles regarding a companies in order to obtain quantitative variables to be employed in econometric analyses. The coefficient measures the relative proportion of favorable to unfavorable reviews regarding a fashion company while controlling for the overall volume of reviews. Since each review may contain both positive and negative accounts, the recording unit is the single paragraph. The range of this variable is -1 to +1, where -1 equals “all negative comments” and 1 equals “all positive comments”. This measure was calculated using the following formula:

$$\text{Imbalance coefficient} = \begin{cases} (p^2 - pn)/(\text{total})^2 & \text{if } p > n \\ 0 & \text{if } f = u \\ (pn - n^2)/(\text{total})^2 & \text{if } n > p \end{cases}$$

where p is the number of favorable comments in the reviews a fashion company receives in the period considered; n is the number of negative comments a fashion company receives in that period.

Appendix 5.5 – General correlation matrix for full dataset

Variable	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
1 N. of placements in 2003	1															
2 Mean placements in other publishers in 2003	.344***	1														
3 Variance in placements in other publishers in 2003	.232***	.726***	1													
4 N. of equivalent pages in 2003	.980***	.337***	.234***	1												
5 Mean equiv. pages in other publishers in 2003	.342***	.993***	.740***	.340***	1											
6 Variance in equiv. pages in other publishers in 2003	.221***	.690***	.984***	.227***	.720***	1										
7 Company has cover	.493***	.280***	.150***	.498***	.283***	.142***	1									
8 N. of fashion shows in 2002-03	.219***	.553***	.415***	.229***	.585***	.431***	.187***	1								
9 Advertising pages in 2002	.748***	.239***	.143***	.744***	.234***	.135***	.419***	.141***	1							
10 Δ Advertising 2002-03	.122***	.063***	.004	.128***	.063***	.003	.101***	.019**	.091***	1						
11 Turnover in 2002 (Euros)	.079***	.199***	.148***	.060***	.154***	.093***	.040***	-.043***	.075***	.027***	1					
12 Total assets in 2002 (Euros)	.082***	.205***	.164***	.066***	.167***	.112***	.043***	.004	.080***	.024***	.916***	1				
13 Number of employees in 2002	.007	.017**	.013*	.006	.015*	.012*	.000	-.015**	-.001	.001	.202***	.220***	1			
14 Return on Sales (ROS) in 2002	.035***	.087***	.049***	.031***	.078***	.045***	.020***	-.103***	.040***	.021***	.124***	.086***	.032***	1		
15 Return on Equity (ROE) in 2002	.014*	.035***	.040***	.014*	.035***	.029***	.012***	-.094***	.005	.019**	.089***	.086***	.027***	.555***	1	
16 Company age in 2003	-.019**	-.466***	-.026***	-.017**	-.043***	-.022***	.000	-.083***	-.017**	.002	.163***	.250***	.257***	.035***	.003	1

\* p < 0.05; \*\* p < 0.01; \*\*\* p < 0.001

Appendix 5.6 – General correlation matrix for sub-dataset

Variable	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	
1 N. of placements in 2003	1																		
2 Mean placements in other publishers in 2003	.293***	1																	
3 Variance in placements in other publishers in 2003	.206***	.756***	1																
4 N. of equivalent pages in 2003	.987***	.283***	.201***	1															
5 Mean equiv. pages in other publishers in 2003	.291***	.993***	.761***	.284***	1														
6 Variance in equiv. pages in other publishers in 2003	.199***	.731***	.987***	.197***	.748***	1													
7 Company has cover	.504***	.278***	.143***	.516***	.284***	.138***	1												
8 N. of fashion shows in 2002-03	.172***	.490***	.300***	.174***	.511***	.321***	.174***	1											
9 Mean collection evaluation	.066***	.190***	.108***	.069***	.202***	.125***	.071***	.329***	1										
10 Mean collection evaluation (coefficient of imbalance)	.061***	.173***	.094***	.063***	.186***	.108***	.073***	.230***	.805***	1									
11 Advertising pages in 2002	.813***	.217***	.136***	.821***	.219***	.133***	.463***	.134***	.054***	.047***	1								
12 Δ Advertising 2002-03	.056***	.005***	-.024	.073***	.041***	-.021	.090***	.072***	.038***	.035***	-.143***	1							
13 Turnover in 2002 (Euros)	.166***	.463***	.351***	.164***	.470***	.359***	.158***	.109***	.101***	.052***	.159***	-.010	1						
14 Total assets in 2002 (Euros)	.133***	.370***	.282***	.133***	.380***	.275***	.120***	.223***	.184***	.162***	.153***	.012	.559***	1					
15 Number of employees in 2002	.118***	.315**	.190***	.117***	.322***	.197***	.118***	.172***	.085***	.000	.116***	-.013	.831***	.903***	1				
16 Return on Sales (ROS) in 2002	.063***	.178***	.114***	.062***	.180***	.120***	.059***	.092***	.084***	.071***	.063***	-.009	.135***	.036*	.122***	1			
17 Return on Equity (ROE) in 2002	.025	.068***	.067***	.024	.063***	.066***	.076***	.062***	-.118***	-.036*	.010	.019	.098***	.015	.108***	.604***	1		
18 Company age in 2003	.039*	.105***	.100***	.047*	.129***	.114***	.053***	.0266***	.279***	.106***	-.018	.077***	-.001	.081***	-.012	.039*	.023	1	

\* p < 0.05; \*\* p < 0.01; \*\*\* p < 0.00



## **6. The multiple case-studies:**

### **Lessons from best- and worst-covered companies**

For fashion companies, quantity and quality of the media coverage of their collections is important. Resources are invested in order to obtain coverage, and public relations personnel and external consultants are evaluated on the basis of their relative effectiveness in obtaining such coverage. This is true for well-established companies, whose role in the industry is however reconfirmed when their products are placed in photo spreads that are consistent with their brand image; and it is even vital for newer companies, for which media coverage may permit to overcome distributive barriers and attract consumer attention. Nevertheless, a consistent finding of my quantitative study is that advertising is a major determinant of visibility: in fashion, a hierarchy of media access exists, and heavy spending companies enjoy a preferential treatment as publisher court them. Thus, advertising matters; but this is just a part of a more complex picture. A basic finding of my preliminary study was that the effectiveness of public relations activities may be improved when they are backed by advertising budgets; but, on the other hand, there are cases when public relations are employed as a substitute of advertising, i.e., to provide with media coverage those companies that cannot or do not want to advertise.

In this chapter, I report the results of a qualitative investigation based on a multiple case-study design. In my preliminary study, I wanted to conduct a background exploration in order to refine my quantitative analyses. In my quantitative study, I wanted to measure the relative impact of different factors on product coverage in fashion services. With this last, follow-up study, I want instead to highlight effective ways to obtain media visibility. The chapter is thus structured as follows: in the first section, I illustrate purpose, methods, and sampling strategy; in the second, I illustrate the main results of my analysis; finally, I discuss such results with theoretical and practical implications in mind.

### 6.1. Purpose, sampling strategy, and method

The case study is “a research strategy which focuses on understanding the dynamics present within single settings” (Eisenhardt, 1989: 534) and permits to “investigate a contemporary phenomenon within its real-life context” (Yin, 1984). My broad research question was “*how do fashion companies influence the quality and quantity of coverage their products receive in fashion services?*” Thus, in the present follow-up study, I shift my focus from explaining determinants to generate actionable knowledge that fashion companies may employ in order to obtain a better coverage. Unlike other qualitative designs such as grounded theory and ethnography, the case study is open to the use of theory or conceptual categories that guide the research and analysis of data. In this case, research effort was guided by the results (and limits) of my quantitative study; yet, I was also open to explore unexpected results emerging from my data gathering an analysis. In other words, I intended to use my “pre-understanding without being its slave” (Gummesson, 1988).

Overall, I selected 12 case studies. Eisenhardt (1989) suggests keeping the number of case studies between 4 and 10, because with more than 10 cases “it quickly becomes difficult to cope with the complexity and volume of the data”. I selected two more cases than the suggested maximum. Of course, as the analysis went on, the marginal contribution of new cases decreased. The latest ones permitted however a more nuanced understanding of some of the phenomena investigated and allowed to shed light over issues that emerged in the course of the analysis. I avoided the risk of “death by data asphyxiation” (Pettigrew, 1988), which is ever-present in multiple case-study research, by remaining focused on my research question. In doing so, I was very much helped by the previous preliminary and quantitative study, which provided a reference point under which comparing novel insights.

Case selection was inspired by a theoretical sampling logic, as proposed by Yin (1984). Eisenhardt (1989) suggests that cases may be chosen “to fill theoretical categories and provide examples of polar cases” (Eisenhardt, 1989: 537). In my selection of cases, I was guided by my previous research findings, according to which

statistical significant predictors of performance are 'advertising' and 'fashion shows'. I constructed a 2 by 2 cell design to explore the joint effect of these two variables over quantity and quality of coverage, as shown in Picture 6.1. Cases were chosen on the basis of replication intentions in which each case had to serve a specific purpose. In other words, each case was selected to see whether it produced the same results for predictable reasons (theoretical replication) or contrasting results for predictable reasons (literal replication) (Yin, 1984). In my study, the within cell comparisons represent literal replication; whilst the cross-cell comparisons represent theoretical replication. Ideally, I would have selected an equal number of cases for each of the cells within the matrix. However, companies that present their collection during fashion weeks are a minority and are not easy to access; for this reason, I was satisfied to have two in the case of high spending companies (i.e., Fendi, Valentino), and one in the case of low spending companies (i.e., Costume National). As far as the latter is concerned, it proved hard to find "Fashion Week" companies with limited advertising budget, yet, since Costume National is an outlier as far as product coverage is concerned, the case resulted to be particularly insightful. Among companies that do not stage fashion shows within official Fashion Weeks, three are high spenders while the others six are not. Companies in cell 3 constitute the bulk of companies in the fashion industry, and thus it made sense to include more of them in my selection.

For consistency reasons, I initially focused on companies whose data were included in my quantitative study. In spite of my intentions, however, I encountered great difficulties in acceding interviewees of appropriate companies. For example, Giorgio Armani would have nicely fit in my sampling strategy; yet, the company's management did not agree to participate to my study because of "the almost daily requests of this kind" they have to face. Also some smaller companies I had previously selected refused to participate for several reasons (e.g., lack of time, no desire to reveal "secrets of the trade", and so on). Other companies did not refuse, yet they continued postponing meetings indefinitely. For these reasons, I felt the need to extend my case selection strategy to companies not included in my 'quantitative' dataset, when a contact was feasible and I felt that by adding them relevant insights could have been gathered. Thus, I traded precision for relevance. For example, Valentino was not

included in my quantitative analysis, yet it proved to be a worthwhile addition because of the company's unique standing within the industry. Another example is A-Style, a start-up entrepreneurial company which is employing unconventional communication strategies to achieve media visibility.

**Picture 6.1 – The case-study selection matrix**

		Fashion shows	
		<i>no</i>	<i>yes</i>
<i>High spenders</i>	- Sixty - Reebok - Hugo Boss	3	1
	- A-Style - 55 dsl - Canali - Hilton-Vestimenta - Pal Zileri - Pierre Cardin	3	2
<i>Low spenders</i>			
			1
			2

Table 6.1 reports the data upon which Picture 6.1 was built. The companies I selected vary in reputation within the fashion industry: some of them are in the history of fashion (e.g., Valentino, Fendi, Pierre Cardin), while others are rising stars (e.g., Costume National). Most of these companies are Italian, but some are local subsidiaries of foreign companies (e.g., Pierre Cardin, Reebok). Some of them are vertically integrated manufacturing companies that actually produce their products (e.g., Costume National, Hugo Boss, Canali, Sixty), while other focus on branding/design (e.g., Pierre Cardin, Reebok, A-Style). Most are at the center of a network of licensees, particularly in the case of non-core products (e.g., perfume, accessories). As far as age is concerned, some of these companies are, relatively speaking, very old, while others have been more recently founded. Some have recently undergone institutional changes: Valentino was recently acquired by the Marzotto group; Fendi was also recently acquired by Prada and the LVMH group; 55 dsl, which existed as a strategic business unit within Diesel, is now a separate company. Only three of these firms present their collections during



Fashion Weeks nowadays. In the past, also other of the sampled companies participated to Fashion Weeks, but they have discontinued doing so in the distant past (e.g., Pierre Cardin) or more recently (Hugo Boss, Canali).

**Table 6.1 – An overview of the selected cases**

#	Company	Magazine coverage (Italy, # of equivalent pages,2003)	Present collections in Fashion Weeks (yes/no)	Advertising (Italy, # of pages, 2003)
1	Valentino, Rome	623	yes	407
2	Fendi, Rome	371	yes	172
3	Costume National, Milan	203	yes	16
4	Hugo Boss Italy, Corsico (MI)	202	no	373
5	Sixty, Chieti	160	no	223
6	Reebok Italy, Milan	68	no	136
7	55 dsl, Marostica (VI)	39	no	12
8	Pierre Cardin Italy, Milan	34	no	12
9	Hilton-Vestimenta, Mattarello di Trento (TN)	33	no	29
10	Forall Group (Pal Zileri), Quinto Vicentino (VI)	25	no	62
11	Canali, Sovico (MI)	21	no	38
12	A-Style, Milan	0	no	0

As far as data collection is concerned, the case study approach typically combines more methods in order to triangulate sources and information to increase the overall validity of research findings (Yin, 1989). I chose a combination of interviews, archives, and observation, with main emphasis on the first two.

- *Interviews* were conducted with appropriate managers of the selected companies that, according to their organizational structures, could be marketing, communication, public relations managers, or even the CEO or entrepreneur, as shown in Appendix 6.1. Although not always possible, I was sometimes able to use multiple informants within the same companies (e.g., both marketing manager and public relation manager; both CEO and external PR consultant). Given the difficulties in acceding appropriate personnel in the fashion industries, I made a parsimonious use of interviews, and conducted them only after relevant

information was gathered through secondary sources. Interviews, mostly, were not tape-recorded. Although I was prepared to do so, I typically felt that the presence of tape-recording devices could harm the confidentiality climate I deemed necessary to the disclosure of professional practices. To deal with the risk of lower accuracy and richness of data, all interviews were conducted with the help of a research assistant that took note of the dialogs, permitting me to concentrate fully on asking questions and responding to interviewees' comments. Reports were written immediately after the interviews, and verbatim quotes were included as much as possible.

- *Archival sources* were of different kinds, and included *inter alia* articles in the business press (e.g., *Il Sole 24 Ore*; *MF Fashion*) and companies' web sites. For established companies (Valentino, Pierre Cardin), well-documented company profiles were also available from 'history of fashion' sources. In the case of companies participating to Fashion Weeks (e.g., Valentino, Fendi, Costume National), reviews of collections reported by the Italian dailies were also considered. Detailed quantitative statistics about advertising and fashion service placements were collected through a fine-grained analysis of the data provided by Visual Box s.r.l. (the market research company that supply me with some of the data I employed during my quantitative study). In addition, I was granted access to Visual Box's *visual* archive of fashion images, which contains company-specific advertisements and fashion services published by a huge sample of magazine (both Italian and foreign). Thus, through this archive, I had access to a wide quantity of images that permitted to include in the analysis also considerations regarding the quality of coverage. For the less covered companies, I was able to consider the entire dataset of related images. In the case of the most covered companies, this was however unfeasible (e.g., in 2003, query about Fendi produced almost 13,000 images), so I focused on a sample of 10-25%, chosen as to represent product mix and time of the year of appearance. Finally, in some cases these "external" sources were complemented by internal documents (e.g., press releases, company profiles, designer bios) that were provided by interviewees.
- In addition to interviews and analysis of archival sources, I conducted *observation* of one-two *prêt-à-porter* fashion shows organized by Valentino, Fendi, and

Costume National. Given that these events are mostly public relations endeavors, this provided me with a heightened understanding of the organizational culture of the companies involved, the interconnection between design and communication choices, the working routines employed to manage the relationship with fashion journalists and influence their interpretations. For companies not participating to fashion companies, I was not able to attend other promotional events targeting the press (e.g., press days); yet, for some of them I was able to visit their presentations during fashion trade fairs. Albeit of more limited usefulness, since these events only marginally target journalists, I was however able to better understand some of the information emerged in the context of interviews. Thus, for example, Hugo Boss and Canali's huge and sophisticated stands at the male collections' trade fair Pitti Immagine Uomo helped me contextualize their choices of stopping staging fashion shows as the substitution of a communication instrument with another deemed most effective. Participating to both trade fairs and fashion shows was insightful, since as my study proceeded I was able to note aspects completely unobserved during my preliminary study. Field notes were taken in order to fix observation and insights.

As the data collection proceeded, I started the *analysis of within-case data*. According to Eisenhardt (1989: 540), this is a process that "allows the unique patterns of each case to emerge before the investigators push to generalize patterns across cases. In addition, it gives investigators a richer familiarity with each case which, in turn, accelerates cross-case comparison". Thus, I analyzed quantity and quality of coverage, composition of promotional mix, advertising investments and advertisement content, information about collections, designers and/or management, organization of the communication and public relations function. I focused my attention on those findings that did not fit well with my previous knowledge, and interpreted them under the background of the company history, organization, strategic trajectories, and success in obtaining coverage. When contradictory data emerged, I made follow-up telephone interviews in order to check for the accuracy of my understanding. Finally, I wrote-up individual cases that, although descriptive in nature, were central to the generation of insight. A brief profile of the cases investigated is reported in Appendix 6.2.

The *comparison among the cases* constituted the next step in the analysis. Since my quantitative study showed that advertising and fashion shows are significant determinant of visibility, my search for cross-case patterns started with a categorization of cases on the basis of the 2 X 2 cell design shown in Picture 6.2. Here, I compared and contrasted the findings relative to each cases in order to highlight within-group similarities and across-group differences. As a result, I obtained a number of overall themes, concepts, and relationships that emerged from the within-case and cross-case comparisons. Results of my cross-case analysis consists in: (i) a characterization of *quality* of coverage; (ii) identification of best practices leading to greater quality and quantity of coverage.

## 6.2. *Main results*

### 6.2.1. *Quality vs. quantity of coverage*

Measuring quantity of coverage is a rather easy endeavor. Yet, not all coverage is the same. Managers responsible for relationship with the media have an intuitive knowledge of what are “good” placements in fashion services: they are able to recognize one, when they see it, as a result of their tacit knowledge. One of the result of my analysis is an explicitation of quality coverage. This conceptualization is a necessary step before identifying best practices leading to it. More precisely, I propose that quality coverage is: coherent with brand image; in the context of fashion services that feature compatible products; and that permits consumers to identify the brand. As far as coherence with brand image is concerned, it must be noted that fashion journalists have several degrees of freedom when selecting products and interpreting their cultural meaning. Both editors and stylists may in fact be considered as actors “whose occupation is the development of cultural symbols” (Hirschman, 1986) and, in their activities, they may produce product symbolisms that could contrast with those that companies try to transfer to their products. In the case of fashion shows, for example, designers and their communication staff try to do of their best to transfer specific cultural meanings to their products; yet, journalists will diffuse to their readers their

own interpretations, that may differ in significant manners. Consider for example Costume National's first women's collection, presented in 1986 during the Milanese *prêt-à-porter Fashion Week*. The concept that inspired the company's designer, Ennio Capasa, was of "reducing things to the max with a silhouette close to the body". The collection was however brushed off by fashion reviewers, one of whom even termed the collection "baby clothes". This criticism, that occurred in so an early stage of the designer's career, had its consequences, and Capasa in a subsequent moment, when commenting the episode during an interview, admitted that his silhouette was "hard to understand" for the press.

In magazines, companies communicate to their audience directly, with their advertisements, and indirectly, through the mediation of the stylists that organize the content of fashion stories and still-life services. In the case of ads, companies are completely free to define the content of their messages in order to transfer to receivers a suggested meaning. In the case of the photo spreads published by magazines, on the other hand, companies' role is limited to the providing of products that journalists select and employ as they prefer. Although the rule of reciprocity may influence the quantity of coverage, these qualitative aspects, because of their inherently subjectivity, are difficult to appreciate and regulate. Consider the case of Reebok. The company has three product lines: Reebok, that stresses performance; Reebok Classic, the line launched in the 1980s that stresses comfort; and *rbk*, the street-style line launched in 2001 that targets the younger market segments that are considered a priority for the company. Reebok Italy, following brand strategies decided at the European level, is trying to "push" the *rbk* line with its marketing and communication efforts. Yet, journalists mostly require Reebok Classic products for placements within fashion services. Thus, a mismatch is being created between the messages vehicled by advertisements and those contain within fashion services, often in the context of the same magazine issues.

Poor coverage may also results when products are sometimes placed together with other products that are not deemed compatible. Both fashion stories and still-life services only rarely feature products realized by one company only. More often they

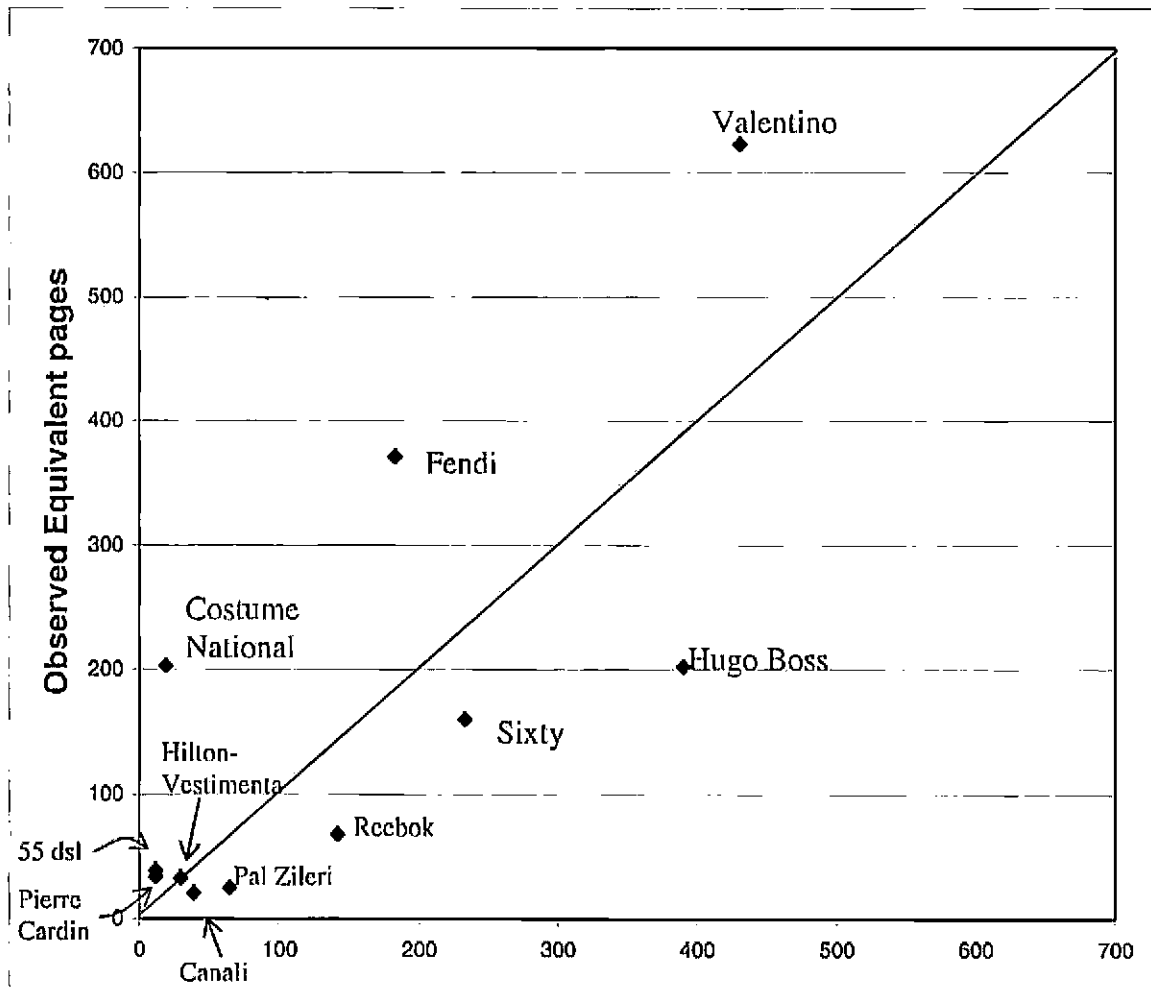
contain placements from different companies' collections, that are jointly displayed in creative manners in the fashion stories, or simply shown in comparative ways in still-life services. In the case of the former, by combining in trendy manners colors, materials, brands, stylists provide consumers with information that can be readily employed in everyday life. In the case of the latter, explicit buying suggestions are provided to consumers. Companies have however little control over the 'joint placement' decision of fashion stylists. As nicely put by Fendi's communication manager, "For us, it is important to be placed with the right competitors. If my products are placed in a service next to those of Gucci or Dior, it's ok. But it would be annoying to be placed with Benetton...". Another dimension of quality coverage consists in the fact that the product is easily recognizable by consumers. Even the most well-covered companies will not be able to benefit from placements should consumers not be able to associate the images they see with a specific brand or company. In part, design decisions are responsible for how promptly consumers are able to identify products. In other cases, however, fashion stylists may maneuver the relative visibility and recognizability of products within services.

#### *6.2.2. Distinguishing above- and under-performers*

Having clear in mind the distinction between quality and quantity of coverage, it is possible to appreciate the distinctive contribution of each of the practices I am going to discuss. Before doing that, it is worth noting that the cases I selected included both companies that are particularly successful in their public relations practices, and companies that are not. Picture 6.2 graphically shows how the selected companies "perform" with respect to the predictions deriving from my quantitative study in the case of coverage in Italian magazines. In the graph, the diagonal is to be interpreted as the "line of equivalence" where the *observed* magazine coverage equals the *predicted* magazine coverage. Thus, companies above the line are those that receive greater than expected coverage; moreover, the more a company is vertically distant from the line, the greater it deviates from the expected coverage. Thus, these companies may be considered 'over-performer' and are cases to consider in order to find best practices. Symmetrically, the companies below the line of equivalence are those which obtain less

than predicted coverage, increasingly so the greater their vertical distance from the line is. Thus, these companies may be considered 'under-performer' and, by contrasting them with 'over-performers', significant differences that lead to greater coverage may be more transparently observable.

Picture 6.2 – Higher- and lower-performing companies in the sample (Italy\*, 2003)



\* Note: Only coverage in Italian publishers was considered in order to avoid the influence of differences in internationalization among companies.

The data upon which Picture 6.1 is built are reported in the following Table 6.2. Among these companies, Valentino, Fendi, and Costume National are those who perform better. To a lesser extent, the same is true also for 55 dsl and Pierre Cardin Italy, whereas Hilton-Vestimenta is roughly on the line of equivalence. Among the under-performers, Hugo Boss Italy is the company with the worst performance; moderately negative performances are also displayed by Reebok Italy, Sixty, Pal Zileri,

Canali. The differences among these companies are striking: Valentino, in spite of the fact that it is well backed by advertising investments, receive roughly 192 pages equivalent of product placement more than expected; Hugo Boss, on the other hand, which is the second top advertising spender among the cases I selected, receives 188 pages *less* than expected. Also when advertising budgets are significantly smaller, remarkable differences exist among companies: for example, Costume National, which has a very limited advertising budget, enjoy the same level of visibility in fashion services of companies which are heavy advertising spenders as Fendi. Thus, these data imply that investigating differences among these companies may be a productive undertaking.

**Table 6.2 – Observed and predicted coverage of the selected cases (Italy, 2003)**

#	Company	Observed coverage (Italy, # of equivalent pages,2003)	Predicted coverage (Italy, # of equivalent pages,2003)	Difference (Observed – Predicted)
1	Valentino	623	431	+192
2	Fendi	371	183	+188
3	Costume National	203	19	+184
4	Hugo Boss Italy	202	390	-188
5	Sixty	160	233	-72
6	Reebok Italy	68	142	-74
7	55 dsl	39	12	+27
8	Pierre Cardin Italy	34	12	+22
9	Hilton-Vestimenta	33	29	+4
10	Forall Group (Pal Zileri)	25	64	-39
11	Canali	21	39	-18
12	A-Style	0	0	-

### 6.2.3. The coverage of "Fashion Week" companies

When looking at Picture 6.1 and Table 6.2, it is evident that the best performing companies in my sample are those which present their collections in the context of Fashion Weeks. Of course, it is not possible to assert that the more than expected coverage enjoyed by Valentino, Fendi, and Costume National is entirely due to their



fashion shows, yet, it is also safe to assume that this circumstance play at least a role in explaining the fact that fashion journalists appear to favor these companies in their selection decisions. Moreover, a cursory examination of the history of these companies shows how their rise to success is intertwined with the acclamation received by their first fashion show presentations. Valentino, unlike other Italian designers that emerged more recently, is strongly associated with *haute couture* rather than *prêt-à-porter*. In the 1950s, still in his twenties, Valentino entered the Paris fashion scene by working for Dessès and Laroche. At the beginning of the 1960s, he established himself in Rome, where his dresses obtained immediate success within the local jet-set. When he presents his female collection at the Italian Fashion shows (that at the time were located at Palazzo Pitti in Florence), he was acclaimed. Despite the fact that his premises were located in Rome and he was Italian, Valentino emerged as one of the leading *couturier* of the 1960s: his acceptance by the *Chambre Syndicale de la Haute Couture* to present his collections during Paris *Haute Couture* Fashion Week played an important part to his international recognition. In spite of his affiliation with high, custom-made fashion, in the 1970s Valentino was the first Italian designer to launch *prêt-à-porter* collection: the cultural meanings of luxury, opulence and exclusivity associated with his own-name brand (*griffe*) paved the way for success also in this newer competitive arena.

The history of the Fendi brand is linked to that of the Fendi family. Originally, the company was associated with competence in fur and leather craftsmanship, not with fashion design. Yet, in the 1960s, the cooperation with the German designer Karl Lagerfeld, who was establishing himself as *couturier* in Paris, changed everything. In 1966, Fendi presented its first *haute couture* collection with Lagerfeld's collaboration in the context of a fashion show that enjoyed an immediate success with Italian and foreign buyers as well as press. In 1969, Fendi added an industrial ready-to-wear line consisting in "beautiful furs at reasonable price", that is presented at Palazzo Pitti. Over the following years, Fendi launches its women's clothing (1977) and men's clothing (1990) lines during as many fashion shows.

Unlike Fendi and Valentino, Costume National is a younger company, which emerged at the end of the 1990s in Milan. The designer, Ennio Capasa, worked for the

well-known Japanese designer Yohji Yamamoto in Tokyo. After having come back to Italy, he launched his own first women's *prêt-à-porter* collection in Milan in 1987. Yet, only 30 people showed, because of the crowded Milanese Fashion Week calendar. Further, the collection obtained somewhat negative reviews. In the following years things did not change a lot. Thus, in 1991, the company decided to start presenting its women's collection in Paris. The first Parisian show was staged in a Roman bathhouse in St Germain. Rumors spread and the season that followed, the company's fashion show attracted around 400 people among buyers, press, and curious. In 1993, Costume National launched his men's ready-to-wear collection in Milan. From 2004, they have been presenting in Milan their younger line, C'N'C.

Thus, in the case of Valentino, Fendi and Costume National, official fashion show presentations were first employed to be noticed by the media and gain international recognition, and to position the companies and their designers as "fine fashion" producers. In subsequent moments, these events were employed to provide with separate visibility individual product lines. Once gained recognition in a given arena (e.g., *haute couture* in the case of Valentino; furs in the case of Fendi; women's ready to wear in the case of Costume National), it was relatively easy to leverage relationships with journalists and the specific cultural meanings associated to the companies to other product arenas. The different historical origins of these companies are evident in the portfolio of Fashion Week participations they hold nowadays. As shown in Table 6.3., what distinguishes these companies is not only the number of fashion shows that a company stages each season (i.e., three in the case of Valentino, two in the case of Fendi and Costume National). Valentino is associated with *haute couture* and Paris; Fendi is nowadays associated with *prêt-à-porter* and present both its women's and men's collection in Milan. Ennio Capasa's Costume National, on the other hand, is associated with Paris, too, for his women's collection. These "qualitative" differences are also likely to impact quantity and quality of media coverage<sup>1</sup>.

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<sup>1</sup> In my quantitative study, I neglected "qualitative" differences and focused on number of fashion shows irrespectively of both gender and location. As far as the former is considered, at an initial stage I separately considered number of male and female fashion shows as predictors of visibility. These two variables were however highly correlated and since they did not add much to the model, I decided to keep their sum as predictor, in order to keep the number of variables to a minimum and avoid collinearity problems. Further, the companies in my sample, with just one exception (Gianni Versace) only showed in

**Table 6.3 – Companies' portfolios of fashion shows**

Company	Women's haute couture collections	Women's prêt-à-porter collections	Men's prêt-à-porter collections
Valentino	Paris	Paris	Milan
Fendi	-	Milan	Milan
Costume National	-	Paris	Milan

It is possible to draw some conclusion by highlighting differences among these three companies and the others, along the distinction proposes in the matrix in the previous Picture 6.1. Valentino and Fendi belong to the same cell, and were chosen with a literal replication logic in mind. These companies are similar since they are established players in the fashion industry, with a symbolic capital that is actively backed by advertising investments. Thus, although they benefit from the rule of reciprocity, they obtain a visibility which is much greater than expected. In other words, being top spenders, being historical brands, and continuing supporting their brand image with fashion shows permit these companies to obtain a great level of media visibility. In spite of the rule of reciprocity, on the other hand, industrial brands that have similar level of advertising budget are much less effective in obtaining coverage. For example, Hugo Boss Italy invests almost as much as Valentino, and much more than Fendi. Yet, the visibility this company receives is much lower than expected. Thus, we may conclude that these companies, by staging fashions shows in the context of official Fashion Weeks, are able to obtain much greater returns from their public relations (and advertising) investments, that act in a synergic manner to strengthen each other.

Costume National, on the other hand, is in a different cell respect to Fendi or Valentino. Instead of creating a synergy with advertising, for this company staging fashion shows permit to *substitute* advertising. With an advertising investment which is marginal (16 pages a year), this company is able to obtain a quantity of coverage similar to that of companies that advertise much more. Thus, for example, both Costume

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Milan, thus making senseless distinguishing among locations. The focus on an Italian-only sample limited greatly the possibility to explore in a quantitative way the difference in impact over coverage of Milan vs. Paris Fashion Weeks.

National and Hugo Boss obtained approximately 200 pages of product coverage in Italy in 2003, but the latter has to invest 373 pages of advertising compared to the 16 pages of the designer-based company. This company has established in the mind of journalists a strong link with the world of fashion (in a way similar to that of Valentino and Fendi), yet it continues to reinforce it with its biannual fashion shows in Paris. If we contrast this case with that of Pierre Cardin, that has ceased sustaining his image by presenting his collections during Fashion Weeks, another tentative conclusion may be drawn. Over the years, the cultural meaning associated to famous brands and designers may be dispersed. Thus, although still an above-performer in that the company still obtain more coverage than expected, Pierre Cardin is far from the performance levels of Costume National.

*6.2.4. The management of coherence with brand image (i): constraining interpretation and restricting journalist selection*

All the companies I investigated employ various tactics in order to transfer well-identified cultural meanings to both their brands and specific collections, meanings that are likely to be favored by specific market segments or subculture of consumptions. Product design, as well as various typologies of communication activities (e.g., advertising, fashion shows, celebrity endorsers, sports and arts sponsorships) are employed to this end. Fashion editors and stylists are important to this end: they are targets of fashion companies' communication activities that stage events and provide them with informational subsidies in the shape of press notes, pictures, sample items. Fashion journalists employ the impressions gathered during events and these media subsidies as inputs in order to produce collection reviews and photo spreads that are diffused to audiences. Thus, fashion journalists act as important intermediaries in the process through which meanings are transferred to brands and collection, since their interpretations and selection decisions may allow desired meanings to pass through, strengthening or weakening them, or block them entirely and substitute them with alternative, own-generated, meanings.

Well-aware of the possibility of undesired journalist interpretation of selection decisions, fashion companies have developed over the years a series of tactics to ensure that their public relations activities will result not only in quantity, but also in quality coverage. Most of these tactics are widely diffused in the industry. For example, all companies that organize fashion shows distribute press notes to the people that intervene, in order to "help" their interpretation of the "spirit of the collection". Similarly, all companies make a "pre-selection" within their collections, so that only certain items are available to stylists for the realization of fashion stories and still-life services. Yet, although these practices constitute "common knowledge" within the industry and are not likely, per se, to constitute a source of competitive advantage, there are idiosyncratic differences among the companies in the ways to realize them. These difference may descend upon a number of factors: organizational structure, working routines, personnel competence, last-minute contingencies, and even the designer's personality. By having in mind whether a company is to be consider an under- or an over-performer, the analysis of these differences may lead to interesting conclusions.

In the case of companies that present their collections in the context of Fashion weeks, reviewer interpretation is managed with the help of various tactics that rely on: (i) fashion show design; (ii) display of "exaggerate" products; (iii) media subsidies; (iv) explicit designer interpretations of collections. At Valentino, Fendi, Costume National, *fashion shows* are designed so that every detail is consistent with the meaning attributed to the collection, so that its interpretation is facilitated. Locations and their scenery; model's bodily type, hairstyle, make-up; the music... All these elements are carefully decided having clear in mind the collection meaning, so that they reinforce each other so that interpretation is constrained. The dresses themselves are an obvious instrument of meaning generation, yet it should be noted that hardly the collections as they are presented during fashion shows, and those that are found in shops coincide. Some of the products the models wear during fashion shows are not conceived to be sold, but for communication purposes, in order to facilitate the comprehension of the spirit of the collection by observers. Media subsidies (i.e., press notes) are employed to propose the "correct" (i.e., desired) interpretation of the collection, sometimes with the specific descriptions of each of the items that was presented. This appears to be particularly

helpful, since fashion reviewers are not always able to report accurately what they see for objective difficulties (e.g., lack of the appropriate vocabulary, difficulty to see details when seated in the last rows, etc.). Often, it is the designer him/herself that, during interviews before (rarely) or after the fashion shows, that comments the collection and proposes its meaning.

Differences however exist among these three companies in how these tactics are employed to “constrain” journalist interpretation. Table 6.4 reports selected comments that are exemplificative of these differences. Valentino has, over the years, been rather stable in the kind of symbolism he has imbued his products with, and as a results the “meaning” of his collections, luxury, elegance, and tailoring, are hardly misrepresented by journalists. In recent years, Valentino is less available than in the past for interviews to “explain” his collections; as a consequences, press notes contain very detailed descriptions of the collection, its sources of inspiration, and the identity of Valentino women and men. Costume National, on the other hand, is known for more abstract cultural references that are often less easily understandable by the observers. As previously noted, his first collection was not well understood by the press, and resulted in negative criticism. Nowadays, designer Ennio Capasa’s sources of inspiration are sometimes equally idiosyncratic; yet, the utmost care is dedicated to the entire fashion show design to ensure that the meaning of the collection is understood.

Consider for example Costume National’s Fall/Winter 2004-5 men’s collection, presented in January 2004 during Milan Fashion Week. Press notes report these designer’s quotations: “The show starts with a hymn to life”; “In this collection, I united military and tribal in a contemporary, free and non-belligerent manner”. These notes highlight the preoccupation that references to military, evident in collection design, could irritate observers and result in negative reviews. Although the show was intended to present male fashion, it begun with a pregnant female model in a wedding dress (see Picture 6.3) after whom the male models, some of which wearing uniform-like outfits and military-inspired boots, could hardly be associated with war and death. Accessories (belts, bracelets, necklaces) were realized employing tiger teeth and similar materials, to

Table 6.4 – Fashion shows and their meaning

#	Company	Selected comments
1	Valentino	<p>“The journalists invited at our fashion shows already know what kind of event it will be and there’s always great coherence between the message we want to transmit and what is reported by the press. This occurs because the meanings that Valentino has always tried to transmit are luxury, elegance and tailoring... Other companies try instead to transmit through very peculiar dresses meanings that are hardly comprehensible by observers...” (PR manager)</p> <p>“Also in <i>prêt-à-porter</i> fashion shows we often propose <i>couture</i>-like dresses” (PR manager)</p> <p>“This is a collection for important women whose personal allure is counterpoint to the richness of their clothes” (Press notes, Fall/Winter 2004-5 Haute Couture collection)</p> <p>“Valentino’s inspiration this season is a man who is sensitive, polite, fashionable, cultured and at the same time strong, determined, manly and proud of himself. He’s not a casual dresser” (Press notes, Fall/Winter 2005/6 men’s collection)</p> <p>“The pivot of the collection is the very high quality of material, colors are black, camel hair, petroleum blue” (Giancarlo Giammetti, Valentino’s partner, commenting Fall 2003 men’s <i>prêt-à-porter</i> collection)</p>
2	Fendi	<p>“In those days, the communication of the following 6 months is at stake, and so everything has to be perfect”.</p> <p>“The fashion show is a moment of transmission of images, sensations. The dress that are shown have to be worn by a certain type of women, in certain circumstances, and if this is not perceived, the fashion show is senseless. What has to remain of fashion shows, then, is a set of unique sensations and images” (Communication manager)</p> <p>“In this season, I wanted to express an idea of movement, of transformation. Here is why all fabrics and materials have more facades and transform themselves on the basis of light” (Silvia Venturini Fendi, commenting the autumn/winter 2004 men’s collection)</p>
3	Costume National	<p>“New collection development is always based upon an idea, an emotion, that serves as a source of inspiration. Supporting communication is thought as to be coherent in every detail... We do our utmost so that everything is perfect” (Communication Manager)</p> <p>“In this collection, every outfit has an individuality of its own. The references are the male icons that most represent me, the more important or influential personalities of my creative path. Like John Lurie, Mick Jagger at the time of Performance, Johnny Rotten and JT Leroy ... I got inspiration from these personalities, who have as trait-d’union that of not being much different on stage than in real life” (Ennio Capasa, commenting the autumn/winter 2004 men’s collection)</p> <p>“A hyper-contemporary action movie, where men are urban samurai and their weapons intelligence, technology, and adaptability” (Ennio Capasa as reported in press notes, commenting the autumn/winter 2004 men’s collection)</p>

convey “tribal” meanings. The designer’s interviews at the end of the show contributed to reinforce a “correct” collection interpretation.

Picture 6.3 – Images from Costume National  
Fall/Winter 2004-5 men’s prêt-à-porter collection





Thus, while Valentino adopt a “keep it simple” strategy as far as collection meaning are considered, Costume National tend to propose a more sophisticated, less easily understandable product symbolism. Both strategies seem to pay, yet the history of Costume National shows that less accessible product symbolism, that is perhaps easily understandable by the consumers the company targets, requires extra care to ensure that journalists will transfer it without distortions. From a different perspective, Valentino is also representative of a “quintessentialness” approach, i.e., that of being inspired by cultural meanings that remain constant over the years, with minor changes that are concessions to short-period fashion trends or the desire to extend the market for the designer’s products to specific target group. Although bounded by the company’s stylistic identity, the sources of inspiration and specific cultural meanings referred to by Costume National’s collection tend to vary much more season after season, and this may increase the risk of journalists misinterpreting the collection. Again, this seems to be a strategy that works (at least as far as quantity of coverage is concerned), yet it requires additional efforts to help journalist interpretations.

Finally, as far as designer interviews are concerned, the three companies are to some extent dissimilar. In the case of Valentino, the designer has become over the years less available for interviews, and sometimes his historical partner in life and business, Giancarlo Giammetti, speaks with the media. The situation of Fendi is peculiar since the company has two designers: Karl Lagerfeld for women’s collections and, more recently, Silvia Venturini Fendi, granddaughter of the company founder (who has maintained her mother family name), for men’s collections. The former is also the chief designer for Chanel, besides drawing his own-name label, and is not always available for interviews, and over the years the latter has become more and more involved as spokesperson for the company. Finally, Ennio Capasa is very active in granting interviews; his personal charisma and his availability for interviews is perhaps one important determinant of the high level of media coverage Costume National’s products enjoy. More on this in the next section.

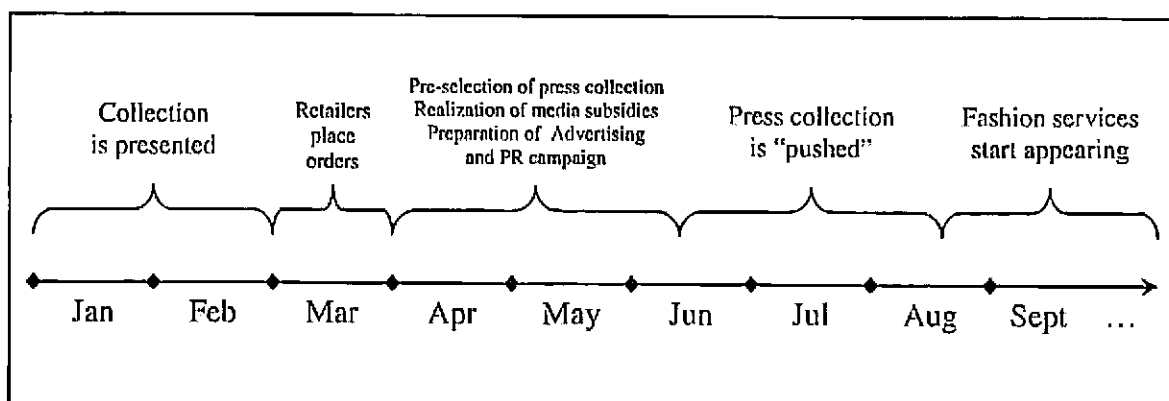
Irrespective of whether they stage or not fashion shows, fashion companies deal with stylists that select their products for including them in fashion services. The main

tactics employed, in this case, is to *restrict* their selection within a limited number of items that are considered quality coverage. Typically, collections are composed of several hundreds to thousands items. Some of them are basic products that have a stable market, yet they do not represent the spirit of the collection (e.g., white shirts, classic lines, basic denim jeans, ...). Thus, these companies identify within their collection a more limited set of items that best represent the spirit of that season's collection. This is not to say that the so-called press collections are pre-selected on the basis of communication reasons only: commercial reasons often play a significant role. For example, high-margin products are often included in the collection. Thus, depending on the individual companies, items to be included in press collections are jointly selected by designers, marketing/communication managers, press officers or external public relations consultants.

Picture 6.4 shows the typical timeline of the related activities for fall/winter collections. At the beginning of the year, collections are presented, either during promotional events (e.g., trade fairs, Fashion Weeks, individual events) or in the context of the companies' show rooms. After the presentation, buyers of department stores and independent retailers place their orders. Very often, by march orders are closed, and companies have sell-in data that are helpful in orienting advertising and public relations campaigns. In the months that follow, companies select the products that will be part of the media collections. Appropriate media subsidies are correspondingly realized, e.g., press notes that explain the spirit of the collection and describe individual items; the so-called "look-book", containing pictures of each of the items; slides and CD-ROMs containing high-resolution still-life pictures of products, whose quality is good enough to be employed in professional printing of magazines. Often, public relations campaigns are coordinated with advertising campaigns. Some companies show their products in their advertisements: in this cases, products shown in ads, which are those that best represent the collection, are automatically included in the press collections. In other cases, advertisements are more "conceptual" and do not show products. In both cases, media coverage permits to provide consumer with a sense of the collection variety, and may be employed in a more flexible way than advertising to provide visibility to specific products as market conditions change. Starting from June, press collections and

appropriate media subsidies are available at companies' own showrooms, or their external public relations agencies'. Efforts to "push" products start to be realized and, hopefully, by the end of august or beginning of September, the collection media coverage starts.

**Picture 6.4 – Timeline of promotional activities for Fall/Winter collections**



That said, also in this case idiosyncratic differences exist among the companies I examined, as tentatively shown in Table 6.5. Firstly, there appears to be a trade-off between "*communication*" vs. "*commercial*" determinants of the pre-selection of items to be included in press collections. Companies as Sixty or Canali tend to prefer commercial determinants, and sales managers have a say over the products that will be included in the media collections. These inclusion strategies will bring better financial results, yet in most cases stylists are not enthusiast to place in their services products that do not have a newsworthiness value. Other companies (e.g., Costume National) are adamant in including in their collections only the items that best represent the season's collection. Fendi is a very good example of efforts to focus attention specific products in order to pursue at the same time both commercial and communication interests. For every season, a new bag model is launched, and all efforts (advertising, public relations, VIP relations) are made so that such model receive maximum visibility, in order to stimulate social contagion phenomena among both journalists and consumers.

Table 6.5 – Strategies to influence stylist selection decisions

#	Company	Characteristics of influence strategies
1	Valentino	<p>n.a.</p> <p>Immediately after the fashion show, the company organizes a Press Day, to provide editors and stylists with the opportunity to examine better the collection. National patterns of preferences among journalists are noted and communicated to retailers and buyers in a later moment, in order to orient their purchases.</p> <p>For each collection, a restricted number of product is identified, and aggressively promoted through advertising. Placements in fashion services are employed to provide with visibility other products in collection. A particular attention is devoted to women's bags. The seasonal collection of bags consists of 7-8 lines, each of which is composed of several models. Two or three of them are the classic lines, that are not pushed with communication. The other lines are trendier and are more heavily promoted. For every collection, one bag is pre-selected to become "the season's must", and communication efforts concentrate on it: it is shown during the fashion shows, in advertisements, placed on celebrities, and pushed with public relations so that it appears on fashion services.</p> <p>These decisions are taken at the HQ in Rome. Local subsidiaries have internal press offices that continuously contact and stimulate placements in appropriate magazines. They are centrally coordinated by the HQ.</p> <p>"It is fundamental to be constantly and continuously helpful [with stylists]. For example, if a Spanish publisher asks for a bag to be placed into a service, I may even have a plane leave on purpose to deliver that bag" (Communication manager)</p>
3	Costume National	<p>The press collection is mostly constituted by the same products that have been presented during the fashion shows.</p> <p>The criterion employed to pre-select is the "maximum representativeness" of the collection.</p> <p>The company's showrooms in Italy and abroad are employed to show the collection to both journalists and buyers.</p> <p>The "press collection" is selected at the corporate level, by the creative staff that typically defy the possible pressures by sales managers.</p>
4	Hugo Boss Italy	<p>For each collection, the most "trendy and representative" products are chosen.</p> <p>The press collection is the same everywhere in the world. It may happen that a given country's Public Relations manager decides to add a peculiar item from the general collection, on the basis of the intuition that it will be appreciated by the country press, yet these are exceptions, and at the corporate level exception are not liked.</p> <p>Also advertising creativity is decided at the corporate level, and thus "the ad that appears on <i>Vogue</i> Germany is the same that appears on <i>Vogue</i> USA". Ads tend to show products. Products shown in ads are also commercially pushed to be ordered by retailers. They are automatically also in the press collection and efforts are made so that they will be selected for coverage by stylists.</p>

Table 6.5 – Strategies to influence stylist selection decisions (continues)

#	Company	Characteristics of influencer strategies
5	Sixty	<p>For each of the company's main brands, the collection consists of about 300–400 products. Among these, 60 per gender are pre-selected to become the “communication items” among those that best represent the spirit of that season's collection. These items are jointly chosen by the communication and the sales manager, to “push” the sell-out, even on the basis of margins.</p> <p>“Our ads are never conceptual, we do show products ... The products we show in ads are well chosen, but on their own they don't lend themselves to communicate collection variety. Visibility in fashion services permits to “push” products and is more flexible than advertising” (Communication manager)</p>
6	Reebok Italy	<p>So far, the company has not dedicated a great attention to product placements in photo spreads. The advertising budget is limited, and the margins of maneuver thus have been equally limited, and the coverage has been accepted irrespectively of its content.</p> <p>The company management is aware of the fact that, to date, stylists have privileged, in their selection decisions, “classic” products over the new lines. Thus, a mismatch exists between the contents of advertisements and other promotional instruments, that emphasize the new brand image of the company (and newer product lines) and target younger market segments, and what is covered in fashion services, i.e., products likely to appeal to older target groups.</p> <p>As nicely put by the company's marketing manager: “If we continue like this, in Italy Reebok could become a splendid geriatric brand”.</p>
7	55 dsl	<p>Collection are launched twice a year, with promotional events also targeting the press.</p> <p>Relationships with journalists are managed by the network of PR offices, which are mostly internal.</p>
8	Pierre Cardin Italy	<p>Advertising is limited and is realized at the brand level, since the license system is very broad in terms of product categories (fashion, tiles, mattresses, ...). Thus, media coverage is important to push products. Yet, the limited advertising budget does not permit to implement effective public relations strategies.</p>
9	Hilton-Vestimenta	<p>For every collection, a number of “total looks” are pre-selected by the company to be pushed for placement within fashion services. This pre-selection is jointly realized by the company's designer, marketing manager, the public relation consultant. These products are selected on the basis of their innovativeness. For each of the company's main export markets, around 30 “total looks” are selected, yet they are not always the same. For example, the collection for the Italian press is the most trendy. In the USA, the products chosen are more classic. The collection for the Japanese press is middle-way between Italy and Japan: neither excessively fashionable, nor too classic.</p>

Table 6.5 – Strategies to influence stylist selection decisions (continues)

#	Company	Characteristics of influence strategies
10	Forall Group (Pal Zileri)	<p>The company manages its relationship with fashion stylists through a network of external PR agencies, each of which has a “mini-collection” within its show room. The composition of these mini-collection is chosen carefully country by country.</p> <p>“We try to adapt it to local tastes, but at the same time we try not to distance it from the Italian taste. For example, in London, where there are many social events, we’ll choose a turtleneck or a suit in Prince-of-Wales, that in Russia wouldn’t really go” (Marketing and communication manager)</p> <p>“Our company needs to appear in fashion services, yet it is difficult because we “fight” against company which are much richer than we are” (Marketing and communication manager)</p>
11	Canali	<p>The press collection is composed of the products most ordered by retailers, that are pushed with both advertising and public relations, in order to stimulate sell-out. Yet, this is not an absolute rule, particularly for products that are not “photogenic”, and mediations between communication and commercial objectives are possible.</p> <p>The pre-selection is realized in Italy, at the corporate HQ, on the basis of intuition. It is, with minor exception, standard for all the many countries where the company is present. As nicely put by the company’s Brand Image manager: “We are present in 80 countries, so it is difficult to take into consideration each country’s tastes”.</p> <p>Both press collection and look books are sent to the network of local public relations agencies, that operationally manage the relationships with stylists.</p>
12	A-Style	<p>No attempt to influence stylists have so far been realized.</p> <p>The company has so far obtained a limited coverage in magazines, yet has enjoyed greater visibility because of its unconventional marketing practices that however tend to provide with coverage the company’s logo rather than specific products.</p>

Secondly, another trade-off appears to exist between *standardization of press collection vs. its adaptation to local contexts*. All the companies in my sample have an international presence. In some cases (e.g., Hugo Boss) the need for a coherent brand image, together with inherent difficulties in managing complexity, leads to a unique press collection for all the countries where the company is present. This does not create problems when the company employ external public relations agencies, yet in other cases local internal press officers may have a better understanding of what will be appreciated by the local press and some conflicts over the management of “exceptions” may arise. Other companies, and not necessarily those greater in size, are more eager to adapting their press collection to local tastes, at least as far as major export markets are concerned. Fendi, for example, organize press days immediately after their fashion shows to provide foreign fashion journalists with the possibility to better examine collections. National patterns of preferences among journalists are noticed and inform both export markets commercial tactics and the product inclusion criteria employed to decide on those markets’ press collections. Thus, rather than being influenced by commercial interests, in this case public relation do influence commercial tactics.

#### *6.2.5. The management of coherence with brand image (ii): celebrity endorsers and the designer as celebrity*

During my in-depth investigations of my 12 case studies, I realized that celebrity endorsers, and designers themselves, are powerful instruments that fashion companies employ in order to transfer specific cultural meanings to their products. These instruments influence both consumers and the press itself, and thus lead to greater and better media coverage. Let’s first focus on celebrities. With a few exceptions, attempts to place products on celebrities are widely diffused in my sample of companies, as reported in Table 6.6. It is worth noting that in most other consumer goods industries, the use of celebrity endorsers in the context of marketing communications is widely diffused; yet, in fashion the endorsement does not occur in the context of advertisements, but rather in supposed “real life” situations and “media events” of various kind where celebrities are seen, photographed, and broadcasted while wearing fashion products.

Table 6.6 - The role of celebrities: An overview of the investigated companies

#	Company	Involvement with celebrities
1	Valentino	<p>Valentino has been cultivating relationships with celebrities since the 1960s, when Rome was the stage of "Dolce Vita" and often visited by Hollywood stars and members of the international jet-set. In that period, celebrities as Jacqueline Kennedy and Elizabeth Taylor were already among his acquaintances. Over the years, Valentino has designed countless Oscar night gowns and some of the world's most expensive wedding dresses (Elizabeth Taylor, Jackie Onassis, Courtney Cox, Jennifer Lopez). Celebrities are often present at fashion shows, particularly (but not only) <i>haute couture</i>.</p> <p>"Celebrities have always been an important hallmark in the history of Valentino, even though today the jet-set is different from the past. Once, celebrities were a few ones, mostly concentrated in Hollywood, and were symbols of exclusivity. Today, on the other hand, the situation is different and we find it difficult to find personalities able to represent Valentino's style... We always try to keep a high standard" (PR manager)</p> <p>"Celebrities are not all equals... In Italy, we dress Michelle Heniker ... We gave her a preferential access to the entire collection... The other celebrities have to be happy with whatever they find" (PR manager)</p> <p>"The mediation of stylists is very important at beginning, but after it becomes very important to establish a direct relationship with celebrities, in order to understand what type of person they are, and how to fully satisfy their needs" (PR manager)</p> <p>"Celebrities guarantee us a strong media visibility, particularly in the press ... A couple of years ago we dressed Julia Roberts for the Oscar nights and, since she won the award for best actress, the images of our dress traveled around the world" (PR officer)</p>
2	Fendi	<p>At Fendi, two people are especially dedicated to establish and maintain relationships with VIPs and with their stylists, particularly in North America. Particular efforts are dedicated to "place" the products the best represent the new collection, in order to start imitative phenomena among consumers. Celebrities are often invited as guests during fashion shows.</p> <p>"Jennifer Lopez is often photographed in public with our bags. Of course sometimes she is not always dressed in an elegant manner and sometimes I regret having provided her with our products... But anyway, she is J.Lo. after all, it's good for our communication" (Communication manager)</p> <p>"We often have to say no to those would-be celebrities that do not embody the Fendi spirit" (Communication manager)</p>
3	Costume National	<p>Relationship with celebrities are pursued to a lesser extent than other companies. Ennio Capasa created a coat of paillette covered with diamond dust for former Rolling Stones Mick Jagger. Celebrities are occasionally present at fashion shows. When wearing Costume National's items of clothing, celebrities are likely to have bought them retail.</p>
4	Hugo Boss Italy	<p>Hugo Boss products are employed to wardrobe films and celebrities, yet this does not seem to be a priority. Greater efforts and investments are dedicated to arts and sports sponsorships.</p>
5	Sixty	<p>Efforts to place products on celebrities exist, but do not seem to be a priority.</p>



Table 6.6 - The role of celebrities: An overview of the investigated companies (continues)

#	Company	Involvement with celebrities
6	Reebok Italy	Reebok branding strategy for sport performance product lines is supported by sponsorship of sporting events, teams, and individual athletes that act as endorsers. In 2001, a new street-style line was launched, inspired by the rap culture, that is endorsed by the known hip-hop singers as 50 Cent and Jay-Z. Although these endorsers are appropriate for the US market, they refer to a subculture of consumption that has a limited presence in Europe. The Italian subsidiary has limited autonomy in adapting the communication campaigns decided on a global level to the local context.
7	55 dsl	Efforts to place products on celebrities exist, but do not seem to be a priority.
8	Pierre Cardin Italy	No active efforts are made to place products on celebrities.
9	Hilton-Vestimenta	No active efforts are made to place products on celebrities.
10	Forall Group (Pal Zileri)	No active efforts are made to place products on celebrities.
11	Canali	The company has woven ties with the US motion picture industry, with the purpose of outfitting well-known male actors that are thought to represent Canali style. The list of these actors includes, among others, John Travolta, Ben Affleck, Vin Diesel, Robert de Niro, Al Pacino, Campbell Scott, Gene Hackman, Val Kimer.
12	A-Style	The company marketing communications are based on brand visibility, so celebrities endorsers fit well. The company has several agreements with television wardrobers, who are employed to place A-Style t-shirts on music programs conductors, and with celebrities. "Celebrity endorsers are very useful. I was very lucky, since some personalities wore my T-shirts spontaneously and their images were diffused by the media... We received a lot of visibility from that" (Entrepreneur) "The important is that the celebrity wears items of cloth even outside of the TV environment, so that people may understand that he does so because he really likes them, not because he is under contract" (Entrepreneur)

While not occurring in the context of advertising, fashion companies intervene in this process and proactively propose “stars” to wear their products and very frequently the endorsement is regulated by a formal agreement that specifies its conditions. Thus, nowadays, very often stars are paid to wear what they wear. On the other hand, often it is the celebrity him/herself that contact the company to require its products. The relationship with celebrities is often mediated by professionals that work as “style consultants” or “stylists”<sup>2</sup> for personalities and television networks. Their work consists in “dressing” celebrities, television conductors and guests, so that they are trendy and project through dresses their desired image. Celebrities lead to product coverage in the form of pictures published in the context of gossip articles. This is a somewhat different form of coverage from that occurring in the context of fashion stories and still-life services, yet it is considered highly desirable because being associated with celebrities is a powerful manner through which product symbolism is created. Besides affecting coverage through gossip services, VIP relations also affect coverage in fashion stylists. Magazine stylists, in fact, often require those products that celebrities have worn. Companies that organize fashion shows often invite their own celebrities as guest or, in more recent years, as models on their own right. This attracts press and video reporters, for which the presence of celebrities is considered news, particularly when they grant interviews that, most often, regards the celebrity’s personal relationship with the brand or designer.

Also in this cases, quality and quantity of coverage may go hand in hand, or be severely divorced. Valentino and Fendi are companies that attract a lot of requests by VIPs and would be celebrities to obtain their products, so that they hardly ever pay to dress VIPs. Within these companies’ communication staff, there are resources whose only responsibility is the relationship with celebrities and their style consultants. These companies tend to “rank” celebrities on the basis of their ability to embody the spirit of their collections and are often compelled to refuse requests. These decisions are often taken at the global level, and US stars, that enjoy global recognition, tend to be

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<sup>2</sup> The stylists working for magazines and those lending their services to celebrities share most of their basic competencies (e.g., aesthetic taste, knowledge of the latest fashions, relational networks with fashion companies’ public relations practitioners).

preferred to local celebrities. Thus, for example, at Valentino they say that nowadays they find it difficult to find in Italy celebrities that are able to represent their ideal woman, while the same is not true among Hollywood stars. Valentino also likes to dress women belonging to social elites. Other companies, instead, tend to prefer celebrities from the sports, highbrow arts, or popular culture, on the basis of their target groups and brand images. For companies with a multinational presence, the usual tensions between local adaptation vs. standardization of brand image occur. For example, the celebrities with whom Reebok has affiliated itself in the US are also employed for communication in Italy; yet, rap singers as 50 Cent or Jay-Z are little known in Italy. Further, relationships with celebrities is not always easy, and once products are delivered, it is hard to “control” that they are employed in an appropriate way in front of the media. Thus, Jennifer Lopez, who is a very good celebrity for Fendi, is sometimes photographed in a somewhat kitsch attire that is not consistent with the image that Fendi wants to project. Yet, in most cases, companies consider the efforts and potential risks worthwhile.

A pattern among cases I realized only in a second moment of my analyses is the differentiated patterns in media coverage of companies associated with famous designers, and those that are not. If we look back at Picture 6.2, all companies that are above the equivalence line (above-performers) have designers or creative directors that have some level of recognition. Underperformer, on the other hand, tend to adopt communication strategies that are brand-based, as better reported in Table 6.7. Although these companies do have designers, they are not provided with a public role, i.e., with the legitimacy to act as the company’s spokesperson. There are historical reasons for this, of course, that are linked to the history of individual companies and of the fashion system as an inter-organizational field. Fashion as we know it was born with the first Parisian *couturier*. Brand names, in fashion, for this reason are often *griffe*, i.e., signature label (e.g., Valentino, Fendi, Canali), and also industrial brands are often named in order to resemble that of individual designers (e.g., Pal Zileri).

Table 6.7 - The role of designers: An overview of the investigated companies

#	Company	Role of Designer
1	Valentino	<p><i>Public role</i></p> <p>The company is named after the designer's first name. Mr. Valentino Garavani has been an icon in the history of fashion since the 1960s. After the sale of its company to HdP group in 1998, and subsequent sale to the Marzotto Group, Mr. Valentino has retained the creative direction of the company. Although he is not the only designer, he personally supervises fashion week presentation, both <i>haute couture</i> and <i>prêt-à-porter</i>. Over the years, Valentino has become more selective with interviews, and the task to deal with the press is assumed by his partner, Giancarlo Giammetti. Although the Marzotto Group's management is always present at fashion shows, they do not act as spokespersons for the company.</p>
2	Fendi	<p><i>Public role</i></p> <p>The company is named after the founders' family name. Founder Adele Casagrande changed the name of the original leather and fur workshop when she married Edoardo Fendi in 1925. The Fendis had five daughters that inherited and run the company.</p> <p>In 1962, the company start cooperating with German designer Karl Lagerfeld, who is emerging in the Paris fashion scene. In 1999, the company is acquired by a joint-venture of Prada and the LVMH group. In 2002, LVMH bought Prada's shares and increases its participation in Fendi.</p> <p>Mr. Lagerfeld role has however been that of a design consultant, and over the year he has cooperated with several other fashion companies (e.g., Chloé, Chanel), besides launching his own-name label. His celebrity, thus, is on a personal basis.</p> <p>Today, Mr. Lagerfeld has the creative leadership of the fur and women's collection. Men's collection are developed by Silvia Venturini Fendi, niece of Adele Fendi, who is very well known for having created the 'baguette' bag which is one of the company's hallmark product. Although other family members are currently employed by the company, Silvia Venturini Fendi is the most known for her creative role and, during men's fashion shows, she act as the company's spokesperson.</p>
3	Costume National	<p><i>Public role</i></p> <p>At Costume National, communication is centered around Ennio Capasa, the company co-founder (with brother Carlo Capasa) and charismatic designer. Mr. Capasa is available for interviews during fashion shows and beyond. Press releases often contains brief quotations that make clear the spirit of the collection, and that are often repeated as they are by journalists.</p> <p>"I didn't want to name the business after myself. I was too young and I wanted some mystery" (Ennio Capasa)</p> <p>"I felt the desire to break the rules, to go 'beyond' . Mixing individualism, freedom and romanticism" (Ennio Capasa)</p> <p>"Ennio Capasa, as a personality, has a lot to say. He is always available, he always speaks with everybody, before and after the runway. Unlike most other designers, Ennio spends most of his time in interviews with the press... He sees journalists on an individual basis, not in groups. And what he say makes him interesting" (Communication manager)</p>

Table 6.7 – The role of designers: An overview of the investigated companies (continues)

#	Company	Role of Designer
4	Hugo Boss Italy	<i>No public role</i> The company was founded by Mr. Hugo Boss in 1923. Although a family business for a long time, no member of the Boss family is part of Hugo Boss AG. Designers do not have a public or communication role. During the occasional events that attract the media attention (e.g., store openings, off-calendar fashion shows), top management act as spokespersons.
5	Sixty	<i>No public role</i> Communication is brand-based.
6	Reebok Italy	<i>No public role</i> Products are designed at the company's headquarters and only minimally adapted to adapt to local tastes. Communication is brand-based.
7	55 dsl	<i>Public role</i> The company is born as a spin-off from Diesel. The creative director is Andrea Rosso, son of Renzo Rosso, Diesel's entrepreneur, who is a celebrity on his own. The company's name, is composed from Renzo Rosso's year of birth, 1955, and the letters composing the word Diesel. Andrea Rosso acts as the company's spokesperson and is sometimes interviewed by the press. "I don't design myself, but I provide with some inputs those who design" (Andrea Rosso) "Having the son of a famous entrepreneur as the creative director helps a lot in the relationship with the press" (55 dsl CEO)
8	Pierre Cardin Italy	<i>Public role, but fashion is not a priority</i> Also in this case, the company is named after the designer's family name. Another fashion icon, Mr. Pierre Cardin started systematic licensing in 1960s. The exploitation of his brand name was to such an extent that the French <i>Chambre Syndicale de la Haute Couture</i> excluded the Pierre Cardin House from its ranks. Over the years, as a brand name, Pierre Cardin has undeniably lost some of his high fashion allure. Mr. Cardin is however a celebrity: he is Peace Ambassador to UNESCO (1991) and was unanimously elected in 1992 to the <i>Institut de France</i> . Yet, Mr. Cardin has long been involved in professional projects outside the fashion industry, which is mainly managed by licensees with a loose control. The companies almost does not advertise, since, according to Mr. Cardin, his name "speaks for itself". No fashion shows in the context of official Fashion Weeks have been organized for a long time. On occasion, retrospective exhibition present a selection of historical dresses. "We don't spend very much in advertising... Just the minimum, but so far the press has always followed Mr. Cardin. Thus, without advertising, we are mentioned three, four times a day in Italian newspapers..." (CEO, Italian subsidiary) "Young people often believe that Mr. Cardin is dead" (Communication manager, Pierre Cardin Italie)

Table 6.7 - The role of designers: An overview of the investigated companies (continues)

#	Company	Role of Designer
9	Hilton-Vestimenta	<i>Traditionally, no public role.</i> In 2002, the company signed a contract with an external designer, Nicola Del Verme, who was signaled in 1990 by the <i>Camera Italiana della Moda</i> as "new talent in high fashion". The agreement was made public with a press meeting at the beginning of 2003, during the trade fair Pitti Immagine Uomo. Mr. Del Verme, continues presenting his own collections during Milan prêt-à-porter Fashion Weeks, and the relationship with Hilton-Vestimenta is not highly visible.
10	Forall Group (Pal Zileri)	<i>No public role</i> The company promotes its products under the "Pal Zileri" brand, that seems to be a designer's name when actually it is not. Collection style is developed by a team of young designers, who do not have a public role.
11	Canali	<i>No public role</i> Canali is a family business, named after the owning family. "In other companies, designers want to be protagonists. They want to appear for personal reasons... Here, we leave the product talk by itself" (Brand image manager)
12	A-Style	<i>No public role</i> External designers develop new collections. Communication is brand-based. The entrepreneur acts as the company spokesperson.

The cases of high-fashion companies as Valentino, Fendi, and Costume National best represent this trend. Mr. Valentino Garavani has long entered the history of fashion and is probably one of the best known designers in the world. After he sold his company, he has retained creative directorship, and personally supervises all fashion shows. The management of the Marzotto Group, which now owns the company, is always present at fashion shows but rarely act as the company spokesperson, and never to comment the collection. Over the years, Valentino has become more selective in granting interviews, yet his celebrity has nevertheless increased. The situation of Fendi is somewhat different, since the creative director of the company's collections was the German designer Karl Lagerfeld that has his own *griffe* and has over the years cooperated with other fashion companies, on both stable basis (i.e., Chanel) or more occasionally (i.e., H&M). Thus, his celebrity is his own, not Fendi's. Perhaps to overcome this problems, in the last five years, the companies' communication strategies have provided with increasing visibility Ms. Silvia Venturini Fendi, a granddaughter of the company's founders, Adele Fendi, and her creations, among which the famous "baguette" bag which has become a hallmark product for the company. Costume National is another significant example of the "cult of personality" that surrounds charismatic designers, and how it can be exploited for communication purposes. Company profiles start with information about Ennio Capasa, the designer, his achievements, his conception of fashion, his personal involvement in designing everything is produced with the Costume National brand. Press notes reports his interpretation of the season's collections. He is very available for interviews and spend most of his time speaking with the media.

Also in other above-performing companies, similar trends are visible. Pierre Cardin, although his link with fashion has watered down over the years, remains a highly visible personality. The company advertising investments are very limited, because of Mr. Cardin's personal belief that "his name speaks for himself", an assertion that has something true since the company's media coverage is greater than expected, both in Italy and France. In the case of 55 dsl, a company that was born as a spin-off from the better known Diesel, the creative director is Mr. Andrea Rosso, son of Diesel's celebrity entrepreneur Renzo Rosso. According to the company's top management,

“having the son of a famous entrepreneur as the creative director helps a lot in the relationship with the press”. In this case, it is worth noting that Mr. Rosso is not a designer, his role is to provide designers with inputs deriving from what is represented as being a superior knowledge of street-style culture. Yet, again, the company may be considered an above-performer, although the affiliation with Diesel (a top advertiser) may indeed play a role. Finally, also Hilton-Vestimenta has recently entrusted the creative direction of its collections to an emergent designer, Nicola Del Verme. However, Mr. Del Verme also designs his own *griffe*, and his involvement with Hilton-Vestimenta is not highly visible.

In spite of these variations, and in spite of the fact that some of these creative directors are not designers on their own (also Ms. Venturini Fendi coordinate a team of designers), or they do not personally design anymore, the construction (or the use) of their celebrity seems to help obtaining better and greater coverage. Their statements are news, and gaining access to them for interviews may provide an advantage to press officers in their relationship with the media. They provide an unique focus of attention for the press, and they are considered the legitimate interpreters of the meaning of collection, thus reducing the risk of deviant interpretations. There are risks inherent in this strategy, of course. The sudden death, in recent years, of Gianni Versace or Nicola Trussardi shows the dangers of a too stringent identification between fashion companies and their designers. Yet, in both cases, members of the family took a public role as company spokespersons, most notably in the case of Donatella Versace, who also creatively direct the company. And the press is always eager to speak with celebrities. Other companies, on the other hand, are less eager to have spokespersons. This is for example the case of Canali: the company is a family business, yet they are critical of those companies where designers are so keen to speak to the press “for personal reasons”. The management of this company prefers that “the product speaks for itself”; yet, it seems that this strategy does not lead to high media coverage.



### *6.2.6. The management of product recognizability*

No matter how successful in obtaining high level of coverage coherent with brand image, fashion companies will not be able to benefit from the consequent visibility if consumers do not recognize the products they see as belonging to a specific company. Most fashion stories and still-life services contain information about the producers of the item shown (for an example, see again Pictures 4.3 and 4.4), yet most magazines are read in an distracted ways. Further, pictures of celebrities published in gossip services will not add to the company's image if consumers are unaware of the fact that, say, the bag Jennifer Lopez is wearing is Fendi's or that Julia Roberts' gown was designed by Valentino. Ironically, coverage of a company's product could even stimulate demand for competitors' products. Thus, fashion companies have developed tactics useful to ensure that their products, when shown, are recognized: (i) distinctive stylistic identify; (ii) logos that attracts the attention and are easily recognizable. Consider the case of Valentino: his products have so a distinctive style that most consumers could see the difference between one of his nightdress and those designed by, say, Versace or Armani. Opulence, magnificent embroideries, meticulous detailing, and peculiar colors (e.g., eggplant, old rose, and his "signature" red) all contribute to make his stylistic identity easily recognizable. The famous "V sign" that is associated to his products are an additional tool employed to ensure recognizability. In the case of Fendi, the company is well associated to the traditional "double F" logo, created by Karl Lagerfeld in 1965; the shape of Fendi bags is also so peculiar that also when worn by celebrities, most consumers (at least those who are prospect buyers) will correctly identify them.

Also Costume National's products are said to be easily recognizable by consumers. Their distinctive stylistic identity derives by the fact that the company's designer, Ennio Capasa, is said to personally design everything, even accessories. The company's communication manager suggests that "he is probably the only modern designer that personally dealt with the realization of our perfume, like the couturier of the nineteenth century". The stylistic identity of Costume National is even verbally

codified. Thus, for example, the brand's character is "underground chic, sensual, authentic, and atemporal"; colors are "the black, sometimes the white, that highlight unperceivable patterns and show the precision of cuts and details. Other colors are employed to define, time after time, the meaning of the different collections". Finally, the sources of inspirations are the Italian tailoring tradition, modern sculpture, rock'n'roll, funk, the Italian cinema of the 1960s, and body art. The importance Mr. Capasa attributes to collection stylistic identity resonates in the following statement, taken from an interview. "There's an excess of marketing today and maybe consumers can really feel intuitively where designers are putting their hand. I esteem a designer when he creates his own history. If I recognize a designer's jacket in a department store, then I really respect it".

The use of logos to increase product recognizability is widespread not only among high fashion companies, but also among those lower in rank. A-Style is representative of a new generation of Italian companies that have been able to achieve greater levels of visibility with the help of unconventional communication tactics . A-Style's strategy turns around the brand logo that, actually, was born before of the company itself. Entrepreneur Marco Bruns invented the logo and, as a joke, with the help of friends, started to stick it on traffic lights in Milan and other European towns. This created curiosity around the logo, and led some individual consumer to produce, on their own, t-shirt displaying it. Mr. Bruns thus decided to start producing his own t-shirts and continuing promoting them with the help of similarly original communication tools (i.e., no advertising, no media coverage). The multiplication of visibility, coupled with the fact that the logo attracts the attention and is easily remembered, probably explains the great increase in turnover that this very young company has enjoyed since its foundation in 2003.

#### *6.2.7. The organization of the public relation function*

In the previous sections, several times reference was made to the fact that the companies investigated organize their public relations function in rather different ways.

Differences regard the location of the PR function (e.g., marketing, communication, press office), the reporting responsibility of officers (e.g., marketing management, top management), the composition and size of the function (e.g., people expressly dedicated to VIP relations in Valentino and Fendi), and many others structural arrangements. The information reported in Table 6.8 help making sense of the differences among these companies under these points of view.

Most striking are the diverging perceptions existing over the use of external public relations agencies. Companies as Fendi, Valentino, Costume National are very much against the use of external agencies, and prefer having their own in-house press officers to manage contacts with the press. Other companies, on the other hand, tend to rely to external agencies that are said to be better able to perform the job because of the relation networks. Some companies even have different agencies on the basis of the specific magazines they target. Many managers of companies employing external agencies noted that the world of fashion journalism is hard to penetrate from the outside. Those who perform the job on daily bases, over the years, develop a “relational capital” that can be employed to place products, also when an advertising budget is lacking or reduced. Such relational capital is individual-based, not company-based. Thus, no matter whether internal or external, the staff responsible for public relations has to be well known among the magazines where coverage is sought. Thus, “make or buy” solutions, per se, are not likely to explain whether a companies achieve greater visibility: rather, the network position (i.e., centrality vs. marginality) of PR personnel within the system of relationships with journalists will be a much better predictor of coverage.

Another difference observed among companies regard the degree of autonomy granted to public relations personnel working within specific national contexts. Most of the companies investigated take their decisions about advertising and public relations campaigns at their corporate head quarters. Local public relations staff, thus, has just executive functions. In the previous sections, it was noted that centralization of these decisions may create less effective strategies, and possible conflicts when local PR staffs insist on exception to adapt to local contexts. Thus, for example, at Reebok Italy

Table 6.8 – The organization of the Public Relations function among the investigated companies

#	Company	Characteristics of the PR function
1	Valentino	<p>The company has press offices in New York, Tokyo, Milan, Paris, Hong Kong. All are composed by own resources and centrally coordinated by the roman HQ. Among them, Milan and Paris are particularly important because they organize the Maison's biannual fashion shows. Their choice of not having external pr is "very reasoned" because it permits to achieve better results.</p> <p>Communication is in staff of the CEO. The company's Head Quarters, from where all communication activities are coordinated, are in Rome. Here, the "central staff" is articulated in two divisions of about 10 people: Advertising and PR &amp; Communication, which interact as necessary. Within the PR &amp; Communication group, each person has specialized functions (press office, media coverage monitoring and archiving, event organization, VIP relations).</p> <p>Milan's subsidiary was needed because most publishing houses are located there, and for facilitating the organization of fashion shows.</p> <p>The company's local subsidiaries, located in Italy (Milan), France, USA, Japan, Hong Kong, each have a press office that constantly interact with Rome.</p> <p>All public relations activities are realized internally; no external agencies are employed.</p>
3	Costume National	<p>The communication manager works in strict contact with the company's designer and CEO. The communication staff consists of 7 people, that internally manage all communication activities (i.e., fashion shows and other events, advertising, press office activities, realization of promotional material, etc.). Costume National has local subsidiaries with showrooms in USA (Los Angeles, New York), Japan (Tokyo), France (Paris). Public relations lean on these showrooms. In some cases external PR agencies are hired: it is the case of the USA, where two different agencies follow, respectively, Costume National and the younger line C'N'C.</p> <p>Unlike other fashion companies, all creative decisions are taken by the designer, Ennio Capasa, personally. Design and communication are believed to be contiguous, and thus are managed centrally.</p>

Table 6.8 – The organization of the Public Relations function among the investigated companies (continues)

#	Company	Characteristics of the PR function
4	Hugo Boss Italy	<p>Hugo Boss AG has a network of local subsidiaries in several dozen countries. Mostly, these subsidiaries prefer to entrust the public relations function to own staff, but there are exceptions. For example, the French subsidiary has two different public relation agencies, one for men's collections, and the other for women's. The Italian subsidiary used to have an in-house press officer, but since she is on a maternity leave, they have hired for this period an external agency.</p> <p>The central HQ in Germany coordinates the network of local public relations so that the global brand image of Hugo Boss is harmonized.</p> <p>"PR is a world of personal contacts. You go ahead if you have contact" (Marketing &amp; Communication Manager)</p> <p>"Having an own PR is advantageous, since only rarely PR agencies have accounts dedicated to one customer alone. In absence of our own PR, we hired an agency that is not too bad, but it is not the same ..." (Marketing &amp; Communication Manager)</p>
5	Sixty	<p>The company has foreign subsidiaries in France, Belgium, UK, Germany. Mostly, they prefer hiring external consultants for their contacts and capacity to interact with journalists. The top management of the French subsidiary prefer having an in-house press officer, yet they hired a person who is very well-known, the daughter of a famous fashion journalist.</p> <p>Some of the brands in their portfolio, they have more than one PR agency. It is for example the case of Murphy &amp; Nye, a brand producing sail-wear that also targets professional crews and, for the latter, has a specialized PR.</p> <p>All PR are coordinated by the Italian Head Quarters in Chieti.</p> <p>"It is a strange world, so the important is that the PR person is well known and has a lot of contacts" (Communication manager)</p>
6	Reebok Italy	<p>Since the beginning of the 1990s, public relations used to be taken care of by an external consultant who was very well known in the sport environment. In 2004, after a change in brand strategy, public relations were entrusted to two external pr agencies, coordinated by the company's consumer marketing manager.</p> <p>The rationale for choosing two agencies lies in their specialized network of contact. One of them is responsible for the "performance" line, Reebok, while the other takes care of the street-style line, rbk.</p>
7	55 dsl	<p>PR are mostly managed by in-house press offices. In some countries (e.g.), external agencies are employed, chosen for their contacts with the editorial staffs of magazines targeting the companies' target groups.</p>
8	Pierre Cardin Italy	<p>The network of local subsidiaries appears to be loosely connected and not much coordinated. The Italian subsidiaries manages the network of licensees and centralizes the PR function for them, yet some of the licensees have autonomous initiatives for both advertising and PR initiatives.</p>

Table 6.8 – The organization of the Public Relations function among the investigated companies (continues)

#	Company	Characteristics of the PR function
9	Hilton-Vestimenta	<p>In Italy, the company has an external pr consultant. In the USA, where the company has its only foreign subsidiary, there is one in-house press officer who takes care of the North American market. In Japan, the company has an agreement with its importer, which has its own PR staff. All PR staff is coordinated by the Italian Head Quarter's marketing manager.</p> <p>"She has been with us for so much time that she is almost like one of us" (Marketing manager, speaking about the PR consultant)</p> <p>"External PR are important for their direct knowledge of editorial staffs. Theirs is a closed world, and it is difficult to penetrate it from outside. Without PR people, we could send the editorial staffs all of our material, but we wouldn't be able to obtain any visibility" (Marketing Manager)</p>
10	Forall Group (Pal Zileri)	<p>Export markets are followed by external PR agencies. In Italy, the PR agency is in Milan, since it would be difficult for the company, from its HQ in Veneto, to keep the contact with editorial staffs. All the network of PR agencies is centrally coordinated by the HQ.</p> <p>"For fashion PR, it is necessary to keep a day-by-day contact" (Marketing &amp; Communication Manager)</p> <p>"If I call them myself, ok, they may know Pal Zileri, but I'm a complete stranger. On the other hand, if our London PR that know them personally call them, it's much easier..." (Marketing &amp; Communication Manager)</p>
11	Canali	<p>The company has 11 show room in several European countries and in USA, Hong Kong, Japan. Public relations are taken care of by external agencies that manage the contact with local editorial staffs, with the coordination of the company's HQ.</p> <p>The internal communication staff is very limited (2 people).</p>
12	A-Style	<p>The public relation function is managed personally by the entrepreneur.</p>

communication strategies rely on celebrities linked to the US rap culture that are not very well known in Italy; at Hugo Boss, local public relations officers sometimes insist on adding products likely to be appreciated by the national press to the press collections decided by the German head quarter's communication staff, who is not much eager to accept "exceptions". Smaller Italian companies, on the other hand, try to adapt their public relations strategies to local context: thus, for example, the Italian press collection of Hilton-Vestimenta is different from both the US or Japanese one. When external public relations agency or consultants are employed, there seems not to be any real alternatives to a "standard" approach; in the case of internal staff, however, as companies as Fendi, Valentino, and Costume National show, there is more room for adaptability.

Another difference observed regards the overall approach that informs the public relation activity, i.e., one-way communication with the media, source to receiver, in order to place products, or two-way communication that include the possibility of a feedback to the source. Consider the case of Fendi; after fashion shows, as previously noted, the company organizes press days dedicated to foreign journalists that are also employed to gather impressions on national patterns of preferences about specific products within the collection that are employed for commercial purposes. Thus, the public relation function acts as "the eyes" of the company and gather information that is employed to influence commercial policies in export markets. Of course, in this case the position of the public relations function within the management hierarchy is very high: the company's communication manager reports directly to the CEO. In other cases, PR endeavors tend to reflect policies decided from the "above" (e.g., sales and export managers) and are not able to influence such policies. External PR personnel is less likely to perform such a role, as are those internal officers who are low in the organizational hierarchies or belong to local subsidiaries (think again to Hugo Boss policy with "exceptions"). Yet, the possibility of gathering this form of feedback seems to prelude to a greater organizational effectiveness.

### 6.3. Discussion

To recap, one of my findings was that besides quantity, also quality of coverage is important. Quality coverage is characterized as: being coherent with brand image; in the context of fashion services that feature compatible products; and that permits consumers to identify the brand. Various tactics have been identified that permit companies to achieve quality coverage: (i) constraining journalists interpretations and restrict their selection decisions to appropriate products; (ii) providing designers and creative directors with a public role, so that they may legitimately inform about the interpretation to be attributed to their collections; (iii) using appropriate celebrity that permit to achieve a different type of coverage (i.e., gossip rather fashion services), yet one which is very good for product symbolism; (iv) designing products with easily recognizable stylistic identity and logos, in order to ensure that media coverage impacts consumers and, possible, affect their behaviors.

On the other hand, I also identified some factors that are likely to improve the returns of public relations investments, as measurable by the "exchange ratio" between advertising and product coverage. Thus, I discovered that high fashion companies, i.e., those who present their collections in the context of official fashion weeks, are more likely to obtain greater visibility for a given advertising budget. The same is true for companies with "celebrity" designers or creative directors; and for companies that are well known for their VIP relations. Further, all else being equal, the "relational" capital of public relations personnel is likely to make a difference as far as quantity of coverage is concerned: the strict relationships between editorial staffs and press officers mixes professional and personal elements, so that "favors" may be claimed. By leveraging on these personal relationships, some level of coverage may be claimed also when advertising budget is limited or non extant.

As a whole, the findings from my multiple case-study investigation somewhat revise those of my quantitative studies. Advertising still matters, of course, yet in-depth information from individual companies shed light over factors that account for the



variance that my regression models left unexplained. The staging of fashion shows in the context of Fashion Weeks, a variable that I found to be significantly related to performance (yet not as much as I expected), was here reconfirmed as an important influencer of the “exchange ratio” between advertising and magazine coverage. Other results were unexpected to a various degree. The fact that public relations matter was noted in the course of my preliminary study, yet not as clearly as when speaking with firms and gathering their perceptions on the “make vs. buy” decision. The relevance of celebrities was hardly a surprise, yet the fashion industry make an use of endorser that is different from that prevalent in other industries, i.e., not within advertisements, but in the context of supposed “real life” situations as many media events are. An unanticipated result was instead the role played by the designer in creating a relationship with the press and in being a source for the transfer of cultural meanings to collections and brands.

These conclusions lend themselves to be transformed into as many hypotheses that could be quantitatively tested with an appropriate research design. Thus, for example, content analysis of appropriate media outlets could provide fairly good measures of designer celebrity: the volume of media coverage dedicated to reporting firm actions and attributing them to the designer; the proportion of media coverage dedicated to the designer rather than to the firm as a whole; and even the extent of media coverage of a designer’s dispositional qualities may be easily correlated to the extent of product coverage and permit to draw interesting implications. Content analysis could also permit to obtain good indicators of individual companies’ VIP relations. Gossip reports of “who dressed who” information regarding celebrities in the context of media events as the Oscar night come most immediately at mind. Other variables of interests would be less easily obtainable from secondary sources. Thus, for example, the relational networks of PR personnel would require primary information, since unobtrusive measures (e.g., whether the company rely on internal staff or external agencies) are likely uncorrelated with this form of social capital. And indicators of coverage quality would definitely require perceptions of managers in charge of public relations to be reliably measured, thus suggesting data gathering through surveys.

*Appendix 6.1. Profile of interviewees within investigated companies*

#	Company	Interviewee Position
1	Valentino	PR Manager; Assistant Press officer
2	Fendi	Communication Manager
3	Costume National	Communication Manager
4	Hugo Boss Italy	Marketing & Communication Manager, PR manager
5	Sixty	Communication Manager
6	Reebok Italy	Marketing Manager, External PR consultants
7	55 dsl	C.E.O., External PR consultants
8	Pierre Cardin Italy	C.E.O., Communication Manager
9	Hilton-Vestimenta	Marketing Manager
10	Forall Group (Pal Zileri)	Marketing & Communication Manager
11	Canali	Brand Image Manager
12	A-Style	Entrepreneur

## Appendix 6.2. Brief profiles of the individual case-studies

### 6.2.1. Valentino

The history of Valentino, as a company, is inextricably linked to that of Mr. Valentino Garavani, who is probably one of the best-known fashion designers in the world. Born in Voghera in 1932, he moved to Paris in his twenties, where he studied at the *Chambre Syndicale de la Haute Couture* and was later assistant of established *couturier* as Dessès and Laroche. By 1960, he established himself in Rome, where he launched his first collection, to emerge in following years as one of the leading *couturier*, despite the fact that his premises were in Rome, and not Paris. In 1998, Valentino and his partner sold their company to HdP group (Holding di Partecipazione); the company was subsequently sold in 2002 to the Marzotto group. Mr. Valentino has however retained the creative direction of the company's collections, and personally supervises fashion shows, both *haute couture* and *prêt-à-porter*.

Picture 1 – Valentino Garavani



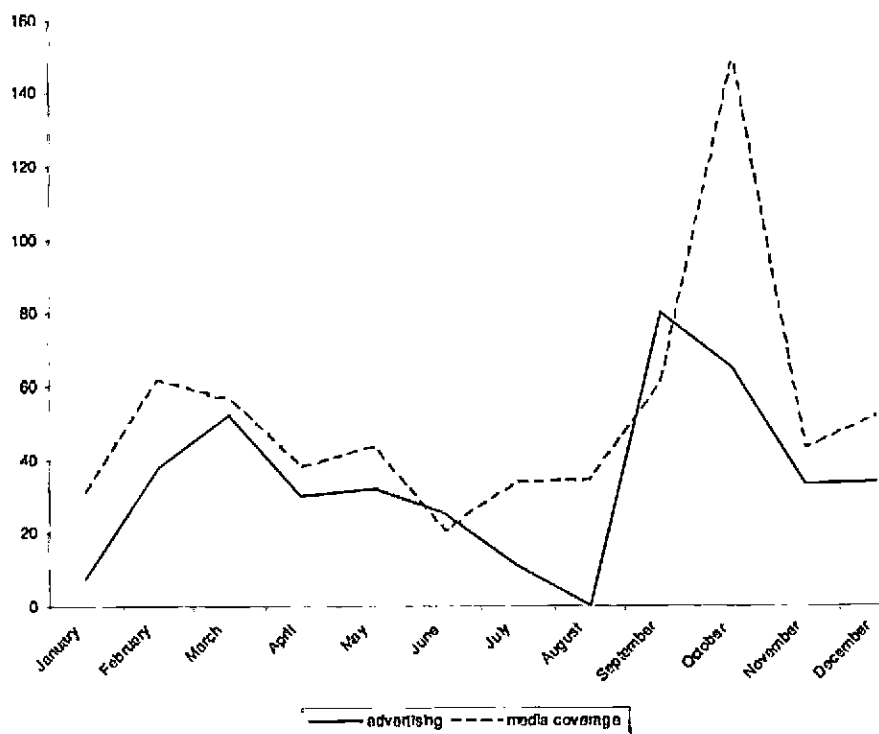
Valentino has a very consistent stylistic identity. His women's clothes have been described as a celebration of the female form, likely to accentuate a woman's sensuality. He has also been reported to say "I don't think any man in the world wants to go out with a woman dressed like a boy". Other elements for which his style is widely known since the 1960s are his signature "Valentino red" and the contrasts between black and white. The items presented during fashion shows nowadays are easily recognizable as quintessential of his style. Through his affiliation with Paris and *haute couture*, Valentino imbues the products sold with the designer's *griffe* with consistent meanings of luxury, elegance and tailoring. Also *prêt-à-porter* collections feature *couture*-like items.

Celebrities are an important element of the strategy through which product symbolism is sustained. Valentino has been cultivating relationships with celebrities since the 1960s, when Rome was the stage of "Dolce Vita" and often visited by Hollywood stars and members of the international jet-set. Over the years, Valentino has designed countless Oscar night gowns and some of the world's most expensive wedding dresses (Elizabeth Taylor, Jackie Onassis, and Jennifer Lopez). Celebrities are often

present at fashion shows, particularly (but not only) haute couture. Two people at the company Head Quarters dedicate themselves to VIP relations, and the company is rather selective in granting Valentino products, since not all stars may embody the spirit of the *griffe*. Besides being surrounded by celebrities, Valentino is now a celebrity on his own. Recently, Valentino has become less available with the press for interviews, which are only granted during fashion shows, and only to selected journalists.

The company's has an international presence also with respect to its public relations. Press offices exist in New York, Tokyo, Milan, Paris, Hong Kong (i.e., the most important export markets), centrally coordinated by the company's Head Quarters in Rome. Among them, Milan and Paris are particularly important because they organize the Maison's biannual fashion shows. Their choice of not having external pr is said to be "very reasoned", because it said to permit to achieve better results in terms of product coverage. The company is a top advertising spender, at least in Italy (see Table 1). The company is also highly visible in the media, and is able to attract media coverage also in countries where its advertising investments are very limited (e.g., Germany). Most of the company's advertising budget is dedicated to clothing, although the brand is visible also because of licensees' own advertisements (e.g., perfumes, watches). Also in these cases, however, the company's centralizes advertising creativity and most public relations efforts, even though, when the "rule of the games" that govern communication as far as some products class are concerned are peculiar, licensees may provide their own feedbacks.

**Graph 1 - Valentino: Advertising and Media Coverage (Italy, 2003)**



Source: Elaborations on Visual Box data.

**Table 1 - Valentino: Advertising and Media Coverage (Selected countries, 2003)**

Country	N. Advertising pages	Magazine coverage	
		N. Placements	N. equivalent pages
France	40.09	285	84,44
Germany	4.00	281	62,74
Italy	407.09	1,855	623,07
UK	30.17	247	71,98
USA	49.00	344	91,66

Source: Elaborations on Visual Box data.

### 6.2.2. Fendi

The company's history dates back to 1925, when Adele and Edoardo Fendi opened their leather-goods shop with annexed fur workshop in Rome. Immediately after WWII, their five daughters (Paola, Anna, Franca, Carla and Alda) joined the family company after finishing their studies. In 1965, the company started cooperating with the young designer Karla Lagerfeld, of German origins, who was emerging in the Paris couture scene. As a result of the designers' creativity and the company's craftsmanship, fur-coats and leather goods (among which, women's handbags) were heavily transformed to become designer's products. In 1966, Fendi presented its first haute couture collection with Lagerfeld's collaboration in the context of a fashion show that enjoyed an immediate success with Italian and foreign buyers as well as press. In 1969, Fendi added an industrial ready-to-wear line consisting in "beautiful furs at reasonable price", that is presented at Palazzo Pitti. Over the following years, Fendi launches its women's clothing (1977) and men's clothing (1990) lines during as many fashion shows. In 1999, after being revitalized by the success of the *baguette* handbag (see below), a part of the company is sold to the LVMH group and Prada. In the following years, the company terminates a number of licensing contracts and reorganizes itself on both an operational and industrial level. By 2003, the LVMH group, the only remaining majority partner, increases its investment in Fendi.

**Picture 2 – Fendi Baguette handbag**



The company is well-known for its handbags, whose shapes are rather easy to recognize. In 1997, the company launched its famous *baguette* bag, developed by Silvia Venturini Fendi, Anna Fendi's daughter, and nowadays creative directors for women's and accessories collections. The tiny bag, which can be carried under the arm like the French bread, was an immediate success: more of 600 versions were created in a few seasons for this cult-object that is still hot in demand by consumers. Another element of the company's stylistic identity is the double

"F" logo, created by Karl Lagerfeld in 1965. At Fendi, celebrities are an important instrument to convey to consumers the meanings associated to the brand. Two people within the Head Quarter communication staff are especially dedicated to establish and maintain relationships with VIPs and with their stylists, particularly in North America. Particular efforts are dedicated to "place" the products the best represent the new collection, in order to start imitative phenomena among consumers. Moreover, celebrities are often invited as guests during fashion shows. As far as designers are considered, Fendi is to a certain extent atypical in that it has two with a public role. Karl Lagerfeld, however, is a design consultant, and besides Fendi he has cooperated over the years with other fashion companies. He is now the creativity director at Chanel, and designs his own-name label. His celebrity, thus, is personal rather than companies'. Starting from the 1980s, Silvia Venturini Fendi has been involved in the creative directorship of Fendi, at beginning with Fendissime, the line targeting younger consumers, and starting from 1992 the company's men's collection. The success of the *baguette* bag in 1997 was unexpected. Since then, although other family members are currently employed by the company, Silvia Venturini Fendi is the most known and, during men's fashion shows, she acts as the company's spokesperson.

Picture 3 – Karl Lagerfeld and Silvia Venturini Fendi



Within Fendi, communication is in staff of the CEO. The company's Head Quarter is in Rome. Here, the "central staff" is articulated in two divisions of about 10 people each: Advertising and PR & Communication, which interact as necessary. Within the PR & Communication group, each person has specialized functions (press office, media coverage monitoring and archiving, event organization, VIP relations). The company's local subsidiaries, located in Italy (Milan), France, USA, Japan, Hong Kong, each have a press office that constantly interact with Rome. All public relations activities are realized internally; no external agencies are employed. Besides "pushing" products to obtain coverage, the PR & Communication staff also listens to journalists in order to gather information about national patterns of preferences to be employed in marketing and commercial activities.

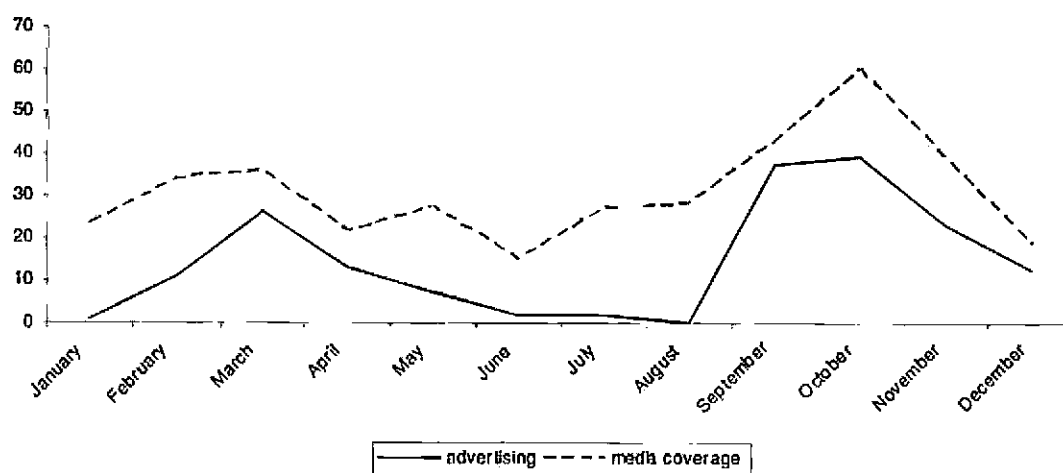
For each collection, a restricted number of products is identified, and aggressively promoted through advertising. Placements in fashion services are employed to provide with visibility other products in collections. Bags are an important part of the placements efforts, and for every collection, one bag is pre-selected to become “the season’s must”, and communication efforts concentrate on it: it is shown during the fashion shows, in advertisements, placed on celebrities, and pushed with public relations so that it appears on fashion services. As shown in Table 2, the company is a heavy advertising spender, particularly in the Italian market, and is also well covered by the media. Notably, it enjoys good levels of coverage also in countries where it does not advertise (e.g., Germany, where products are not distributed). Among the items most covered are the handbags.

**Table 2 - Fendi: Advertising and Media Coverage (Selected countries, 2003)**

Country	N. Advertising pages	Magazine coverage	
		N. Placements	N. equivalent pages
France	76.25	294	92.54
Germany	0	274	74.66
Italy	172.75	1,226	371.01
UK	87.25	291	75.41
USA	92.75	211	66.55

Source: Elaborations on Visual Box data.

**Graph 2 - Fendi: Advertising and Media Coverage (Italy, 2003)**



Source: Elaborations on Visual Box data.

### 6.2.3. Costume National

Costume National was founded in 1986 by the Capasa brothers, Ennio and Carlo. The former is the company’s designers, while the latter is its CEO. After studying in Milan, at the Brera Academy of Fine Arts, Ennio Capasa worked for a period in Tokyo, for the established Japanese designer Yohji Yamamoto. After having come back to Italy, in 1987 he launches his own first *prêt-à-porter* collection in Milan,

which however receives some criticism from fashion reviewers. In 1991, the company decided to start presenting its women's collection in Paris and start enjoying success. In 1993, the first men's collection is presented in Milan. The company has now an international presence, through subsidiaries in France, USA, and Japan. Unlike other designer company, it is vertically integrated and actually manufactures most of the products that are sold under the Costume National brand.

Picture 4 – Ennio Capasa



Costume National's communication is centered on the designer, and benefits from its charisma. Ennio Capasa is available for interviews during fashion shows and beyond, and is the only spokesperson for the company. Press releases often contains brief quotations that make clear the spirit of the collection, and that are often repeated as they are by journalists. Ennio Capasa is reported to be the creator of every single item that is sold under the Costume National brand (even accessories and perfumes). This permits to maintain the distinctiveness of the brand's stylistic identity, which has been even verbally codified. Thus, for example, the brand's character is "underground chic, sensual, authentic, and atemporal"; colors are "the black, sometimes the white, which highlight unperceivable patterns and show the precision of cuts and details. Other colors are employed to define, time after time, the meaning of the different collections". Finally, the sources of inspirations are the Italian tailoring tradition, modern sculpture, rock'n'roll, funk, the Italian cinema of the 1960s, and body art. Relations with celebrities, at Costume National, are pursued to a lesser extent than other companies.

The communication manager works in strict contact with the company's designer and CEO. The communication staff consists of 7 people, that internally manage all communication activities (i.e., fashion shows and other events, advertising, press office activities, realization of promotional material, etc.). Public relations lean on the company's local subsidiaries, which all have showrooms. In some cases external PR agencies are hired: it is the case of the USA, where two different agencies follow,



respectively, Costume National and the younger line C'N'C. Ennio Capasa is involved in all communication activities that he personally provides with input and supervises in order to make them coherent with the company's stylistic identity. Admittedly, ideas and concepts that inspire collections are sometimes of not immediate comprehensibility; thus, efforts are made to ensure they are properly interpreted.

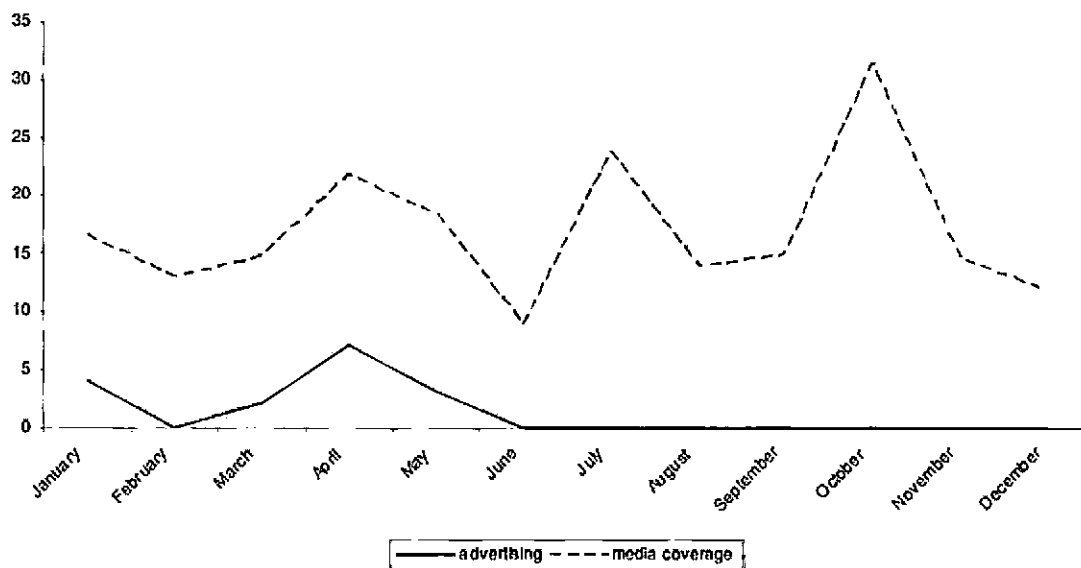
Costume National advertising investments are very limited (see Table 3). Yet, the company's products enjoy high levels of media coverage, much greater than expected, also in countries where no advertisements appear. Such visibility mostly regards clothes, but to some extent also shows and leather goods.

**Table 3 – Costume National: Advertising and Media Coverage** (Selected countries, 2003)

Country	N. Advertising pages	Magazine coverage	
		N. Placements	N. equivalent pages
France	7	107	31.01
Germany	0	102	24.24
Italy	16	645	203.01
UK	0	152	37.01
USA	1	137	43.07

Source: Elaborations on Visual Box data.

**Graph 3 – Costume National: Advertising and Media Coverage (Italy, 2003)**



Source: Elaborations on Visual Box data.

#### 6.2.4. Hugo Boss Italia

Hugo Boss AG is one of the global market leaders for men's clothing in the up-market segment. The company was founded by clothier Hugo Boss in 1923; although a family business for a long time, no member of the Boss family is nowadays part of the

company. The company is listed at the Frankfurt Stock exchange, and is controlled by the Marzotto group. The company has an extended international presence, through a network of local subsidiaries responsible for their countries' sales and promotion. Marketing is centered on the company's brands: Boss Woman, Boss Black (top quality), Boss Orange (the trendiest line), Boss Green (sportswear and casual), Hugo (avant-garde) and Baldessarini (luxury). Accessories are licensed. Collection development is realized by creative teams of designers that do not have a public role.

Corporate and brand communication is managed globally from the group Head Quarters in Metzingen, Germany, that coordinate both external PR agencies and in-house PR offices. Corporate communication concentrates on media reports, press conferences as well as events (Shareholders' meetings, ...). Brand communication supports and strengthens the images of the individual brands. Moreover, the brands are emotionally charged by wardrobing films and celebrities with Hugo Boss products, with the help of arts and sports sponsorships, and with special fashion events. In the past, the company presented its collection in the context of fashion shows, yet it has discontinued doing so for some years, because of the recent economic uncertainties in the global market. Advertising is managed at the company Head Quarters, with the help of external advertising agencies. Advertising campaigns are standard (i.e., the content of ads is the same in different countries). Also public relations campaigns are standard: the press collection is selected at the corporate level, and includes the most trendy and representative products only. It may happen that a given country's Public Relations manager decides to add a peculiar item from the general collection, on the basis of the intuition that it will be appreciated by the country press, yet exceptions of this kind are hard to be accepted.

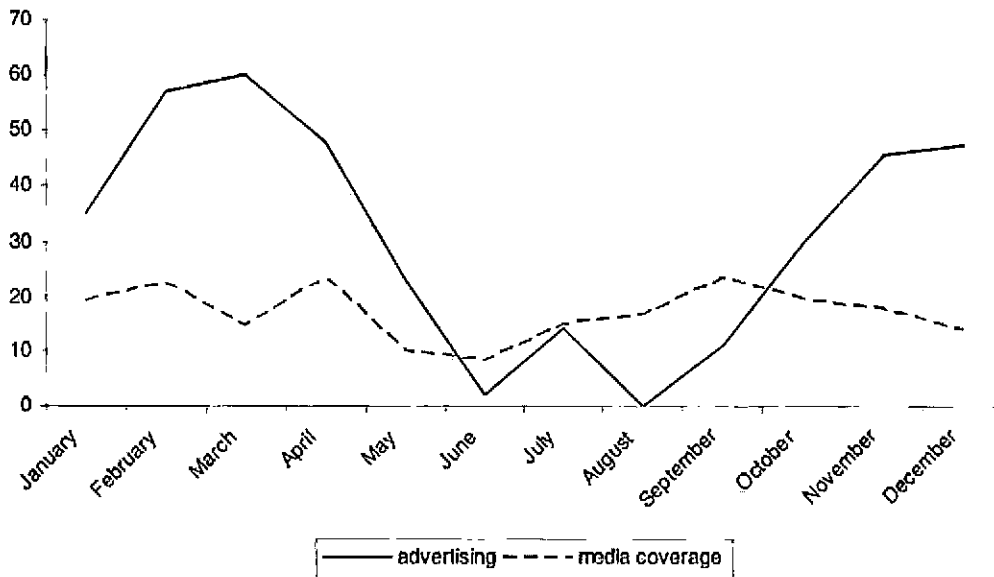
Hugo Boss is a top advertiser in most countries where it is present and thus enjoys high levels of media coverage. Yet, the "exchange ratio" between advertising and coverage is lower than 1:1, both on an aggregate level and for individual publishers. For this company, thus, product coverage is heavily sustained by the advertising budget.

**Table 4 – Hugo Boss: Advertising and Media Coverage (Selected countries, 2003)**

Country	N. Advertising pages	Magazine coverage	
		N. Placements	N. equivalent pages
France	124	311	75.70
Germany	198.20	781	171,4
Italy	373.29	791	202,29
UK	215.2	418	101,89
USA	116.24	250	72,68

*Source:* Elaborations on Visual Box data.

**Graph 4 – Hugo Boss: Advertising and Media Coverage (Italy, 2003)**



Source: Elaborations on Visual Box data.

#### 6.2.5. Sixty

The Sixty group is composed of three companies, each of which manages autonomous brands with individual target groups, market strategies, and promotional mixes. Sixty spa manages the brands Miss Sixty, Energic; Sixty Factory manages the brands Sixty pro-tech, Decauville, Killah, Dake, AYOR, Double-E; Sixty Active manages Murphy & Nye, Forniture Navali, Jasperville, K.Blost. Products are casual-wear and sports-wear, are of average quality, and their sales are sustained by branding strategies. The company has foreign subsidiaries in France, Belgium, UK, Germany, and is distributed in many other countries through local partners.

The company is entrepreneurial in nature, and communication managers mostly have functions which are operational in nature. Brand strategies are in fact decided by commercial managers. Communication managers coordinate from the company's head quarters, located in Chieti, a network of local public relations agencies, although in one case the management of a local subsidiary has preferred an in-house press officer. For some brands, the group has more than one PR agency. It is for example the case of Murphy & Nye, a brand producing sail-wear that also targets professional crews and, for the latter, has a specialized PR agency.

Advertising tends to show products rather than being "conceptual" in nature. Placements in photo spreads are instead employed to communicate the sense of the collection's variety. For each of the company's main brands, collections are in fact composed of approximately 300-400 items. Among these, 60 per gender are pre-selected to become the "communication products" among those that best represent the spirit of that season's collection. These items are jointly chosen by the communication and the sales manager, to "push" the sell-out, even on the basis of margins. The company is a heavy advertising spender in most countries where it is present. With the

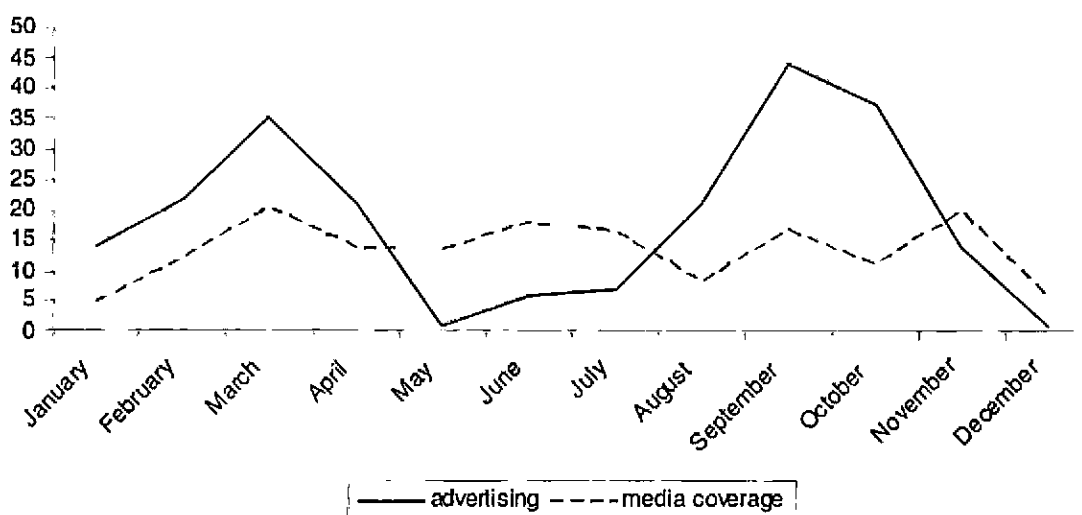
exception of Germany, where it is not present yet receives a high level of coverage, Sixty is usually characterized by an “exchange ratio” between advertising and coverage lower than 1:1.

**Table 5 – Sixty: Advertising and Media Coverage (Selected countries, 2003)**

Country	N. Advertising pages	Magazine coverage	
		N. Placements	N. equivalent pages
France	51.33	159	33,73
Germany	0	388	81,07
Italy	223	693	160,49
UK	197.17	257	48,51
USA	121.83	178	53,93

Source: Elaborations on Visual Box data.

**Graph 5 – Sixty: Advertising and Media Coverage (Italy, 2003)**



Source: Elaborations on Visual Box data.

#### 6.2.6. Reebok Italia

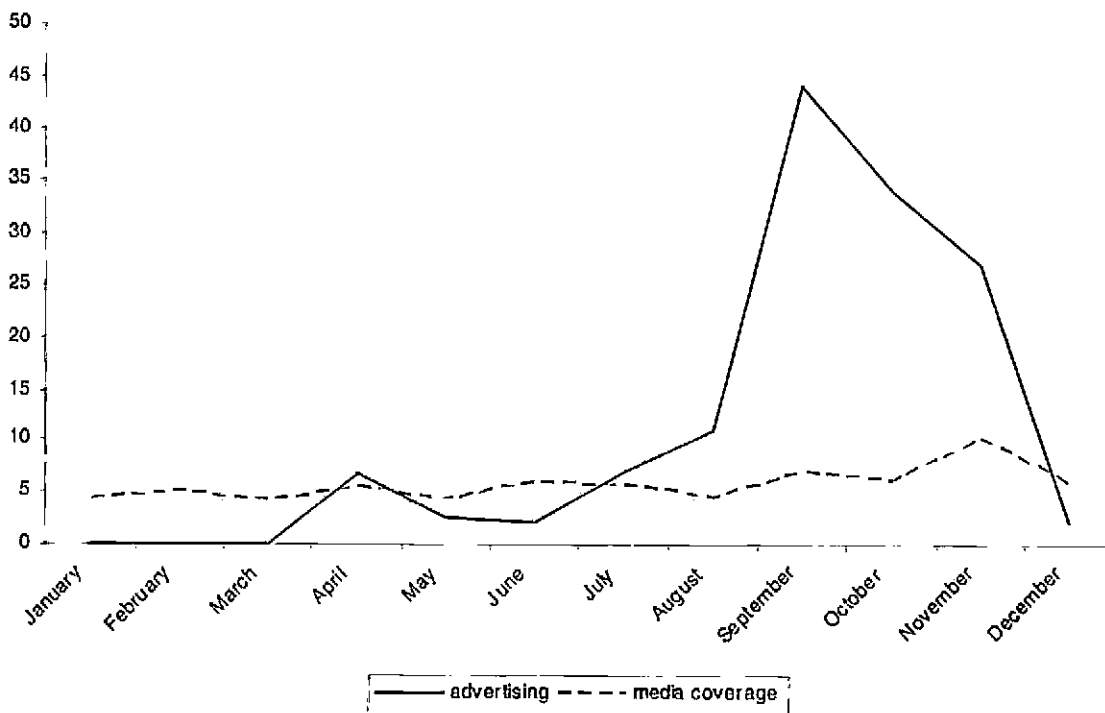
Reebok is a multinational company, founded in 1958, that produces sports and leisure products. At the global level, the company is one of market leaders, second only to Nike. In Italy, however, although Reebok enjoys a great level of brand awareness among consumers, being a “historical” brand, its market share is very limited and the company has undergone financial difficulties. In 2004, the Italian subsidiary has generated a profit after a period of significant losses. Reebok branding strategy is coordinated by the company’s head quarters at the global level. Marketing is centered on the company’s brands: Reebok (sport and fitness performance); Reebok Classic (comfort); *rbk.* (street-style). The latter, launched in February 2002, targets younger market segments and is considered a priority for Reebok and its future development. Attempts to promote *rbk* have relied on a global marketing campaign, termed “Sounds & Rhythm of Sport”, that has employed television and print advertising, in-store promotions, special events, celebrities. In particular, the campaign involves the athletes that Reebok sponsors within the US National Basket Association and US National

Football League, tennis players, together with music stars in the hip hop and rap scene. Endorsers for the campaign were 50 Cent and Jay-Z, known hip hop artists that embody the *rbk*'s street-inspired style.

Reebok Italy, following brand strategies decided at the European level, is trying to "push" the *rbk* line with its marketing and communication efforts. Yet, journalists mostly require Reebok Classic products for placements within fashion services. Thus, a mismatch is being created between the messages vehicled by advertisements and those contain within fashion services, often in the context of the same magazine issues. As nicely put by the company's marketing manager: "If we continue like this, in Italy Reebok could become a splendid geriatric brand". Data regarding the composition of the advertising and editorial mix, reported in Table 6, show in effect that while advertising is pushing clothing, most of the media coverage the company enjoys regards shoes.

The new brand strategy has also fostered a restructuring of the public relation function. Since the beginning of the 1990s, public relations used to be taken care of by an external consultant who was very well known in the sports environment. In 2004, after the change in global brand strategy, public relations were entrusted to two external pr agencies, coordinated by the company's consumer marketing manager. The rationale for choosing two agencies lies in their specialized network of contact. One of them is responsible for the "performance" line, Reebok, while the other takes care of the street-style line, *rbk*. Since the marketing & communication staff within Reebok Italia is very limited, no alternative arrangement would have made sense.

**Graph 6 – Reebok: Advertising and Media Coverage (Italy, 2003)**



Source: Elaborations on Visual Box data.

**Table 6 – Reebok Italy: Advertising and Media Coverage by product category, 2003**

Product class	N. Advertising pages	Magazine coverage	
		N. Placements	N. equivalent pages
Clothing	86	58	15,53
Corporate	1,33	21	5,55
Glasses	1,02	13	3,71
Shoes/Leather Goods	48	166	40,17
Swimwear	0	5	1,32
Underwear/Nightwear	0	3	0,35
Other	0	13	2,28
<b>Total</b>	<b>136,35</b>	<b>279</b>	<b>68,9</b>

Source: Elaborations on Visual Box data.

#### 6.2.7. 55 dsl

55 dsl was born in 1994, as a specialized product line inspired by action sports like snowboard, surf and skateboard, and the lifestyle that surrounds them, within Diesel, a very successful Italian casual fashion company, run by entrepreneur Renzo Rosso. After five years of activity under Diesel, 55 dsl had a spin-off in 1999 and started its own independent life. The company is globally distributed in fashion / streetwear stores, with a stronger presence in Italy, UK, Japan, Germany, USA and France, and has recently opened four flagship stores in New York, London, Milan, and Tokyo. Store design, communication, and product development are coordinated by the creative director, Andrea Rosso, one of Renzo Rosso's sons. Andrea Rosso, is not a designer, but he coordinates the company's team of designers, and act as the company's spokesperson in the relationship with the media. As nicely put by the company's CEO, "Having the son of a famous entrepreneur as the creative director helps a lot in the relationship with the press".

**Picture 5 – Andrea Rosso**



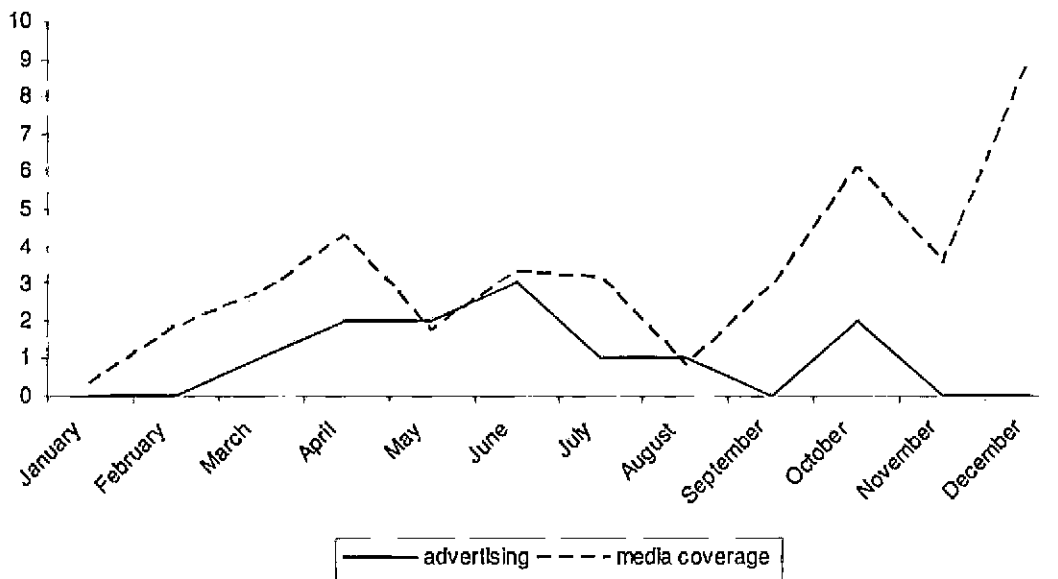
All communication activities are managed centrally, under the coordination of the creative director. Advertisements are often “conceptual” and remind of those realized by the parent company, Diesel. Thus, magazine coverage is important since it permits to provide with visibility individual products. Relationships with journalists are managed by the network of in-house press offices; in some cases (e.g., Italy), external agencies are employed, chosen for their relationship with specific magazines whose readership is very similar to the company’s target groups. As shown in Table 7, most of the advertising budget is invested in Italy. The “exchange ratio” between advertising and coverage, at the aggregate level, is greater than 1:1.

**Table 7 – 55 dsl: Advertising and Media Coverage (Selected countries, 2003)**

Country	N. Advertising pages	Magazine coverage	
		N. Placements	N. equivalent pages
France	0	42	4.81
Germany	2	4	1.40
Italy	12	171	39.66
UK	8	54	8.31
USA	0	10	1.59

Source: Elaborations on Visual Box data.

**Graph 7 – 55 dsl: Advertising and Media Coverage (Italy, 2003)**



Source: Elaborations on Visual Box data.

#### 6.2.8. Pierre Cardin Italie

Of Italian origins, soon after WWII, Piero Cardin establish himself in Paris, where he start working for Christian Dior and Balenciaga. In 1950, he creates his own *Maison*. The one thing for which Pierre Cardin is famous is his systematic exploitation

of his signature label. While many other *haute couture* houses licensed their lines or products, by the late 1980s, Cardin had signed up around 800-900 licensees worldwide, in apparel, cosmetics, home furnishings, and appliances, to such a heightened rhythm that it became difficult to control the quality of products that were sold under the designer's name, that soon lost their stylistic identity. The company's image as an innovative fashion innovator was compromised, and the *Chambre Syndical de la Haute Couture* ended up excluding the Pierre Cardin house from its ranks. Today, Pierre Cardin is a diversified group that, besides coordinating more than 600 licenses in the world, is implicated in a number of other activities (e.g., distribution of luxury foods under the brand Maxim's; mineral waters; etc.). The Pierre Cardin brand name has however undeniably lost some of its allure, and is not well known among younger consumers. Perhaps because of the enormous visibility provided by the licensing system, Mr. Cardin is however a celebrity. Besides his achievement in fashion, he is Peace Ambassador to UNESCO (1991) and was unanimously elected in 1992 to the *Institut de France*.

Picture 6 – Pierre Cardin



Pierre Cardin Italie is the group's Italian subsidiary, responsible for supervising the licenses issued for Italy and Turkey. In Italy, there are 25 licensees that produce, *inter alia*, mattresses, linen, ceramic tiles, socks, shoes, bridal dresses, apparel, ties, shirts, leather goods, scarves, furnishings, sportswear, underwear, umbrellas, glasses. The company is relatively autonomous from the group's head-quarters, and is also responsible for promotional activities over the areas of responsibility. No fashion shows in the context of official Fashion Weeks have been organized for a long time. On occasion, retrospective exhibitions present a selection of historical dresses. Advertising is very limited (see Table 8), since according to Mr. Cardin, his name "speaks for itself". As nicely put by the Italian subsidiary's CEO, "We don't spend very much in advertising... Just the minimum, but so far the press has always followed Mr. Cardin. Thus, without advertising, we are mentioned three, four times a day in Italian newspapers...". And, in effect, a significant part of the media coverage the company receives is at the corporate level or, most precisely, regard Mr. Cardin rather than the company or its products (see Table 9). Since the licenses product categories are very broad, advertising is mostly brand-based. Thus, media coverage is important to "push" specific items products. Yet, the limited advertising budget is an obstacle to effective



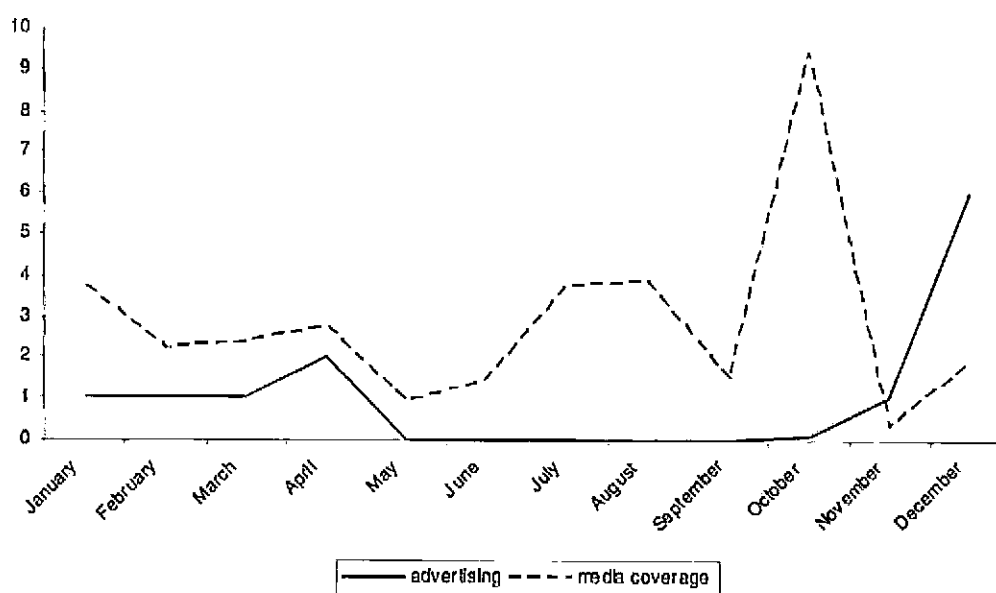
press office work. On occasion, licensees realize own advertisements and public relations initiatives; this should occur under the coordination of Pierre Cardin Italie, yet the company is not very stringent in enforcing this rule.

**Table 8 – Pierre Cardin: Advertising and Media Coverage (Selected countries, 2003)**

Country	N. Advertising pages	Magazine coverage	
		N. Placements	N. equivalent pages
France	0	52	19.57
Germany	0	4	0.54
Italy	12.07	128	34.42
UK	0	0	0
USA	0	0	0

Source: Elaborations on Visual Box data.

**Graph 8 – Pierre Cardin Italie: Advertising and Media Coverage (Italy, 2003)**



Source: Elaborations on Visual Box data.

**Table 9 – Pierre Cardin Italie: Advertising and Media Coverage by product category, 2003**

Product class	N. Advertising pages	Magazine coverage	
		N. Placements	N. equivalent pages
Clothing	11	43	13.77
Corporate	0.07	44	15.29
Jewellery	0	3	0.35
Other	0	2	0.20
Shoes/Leather Goods	1	24	3.18
Swimwear	0	3	0.69
Underwear/Nightwear	0	9	0.94
<b>Total</b>	<b>12.07</b>	<b>128</b>	<b>34.42</b>

Source: Elaborations on Visual Box data.

### 6.2.9. Hilton-Vestimenta

The company, founded in 1962 with the name Hilton, is present in the market both with own brands and as the industrial partner of designer brands. As a whole, this has led the company to have a low communication profile. In 1970, the company's designer was Giorgio Armani; for two years, the company had a collection Hilton by Giorgio Armani. Subsequently, when Armani established his own company, he maintained a relationship with Hilton, since the company used to produce the designer's black label. Maintaining a low communication profile was thus necessary in order to avoid relational problems with the designer and sending confusing signals to the market. In 2000, the company divided itself in two: one, called Borgo 21, is a joint venture with Armani, who owns 60% of it. The original company, Hilton, became Vestimenta. The company has recently become the licensee of brands known as Trussardi and Calvin Klein.

The company has a foreign subsidiary in the USA, which is responsible also for Canada. Italy represents around 30% of Hilton-Vestimenta's turnover; the most important export markets are Europe, Japan and North America. The company's collections are distributed with the brand Hilton in Italy, other European countries, and Japan. In the USA & Canada, the company is present with the brand Vestimenta, since there Hilton was still a registered trade mark. Having the same collections promoted with a different brand name in different parts of the world, of course, creates some problems. Another of the company's problems is their positioning as far as product quality is concerned: they are "too much sophisticated" for being an industrial brand, but "not enough" to be considered a *griffe*. Thus, this creates some problems, for example in gaining access to appropriate retailers.

#### Picture 7 – Nicola Del Verme



In 2002, the company has entrusted its artistic direction to Nicola Del Verme, an emerging designer, who has become responsible for designing new collections (both men's and women's) and for communication activities. Born in 1962, in the 1980s he started cooperating in Rome with established fashion ateliers as those of Lancetti and Gattinoni. In subsequent years, he started acquiring a public profile: in 1986, he won the Italian "new *prêt-à-porter* talents" contest; in 1990, the *Camera Nazionale della Moda Italiana* signals him as "new high fashion talent" and, soon after, he presents his own first collection. At the same time, he starts cooperating with established companies, including Max Mara (1994), Trussardi (1997), Ichtys Montecarlo (1999). The agreement with Hilton was publicized with a press meeting at the beginning of 2003, during the trade fair Pitti Immagine Uomo. Mr. Del Verme, however, continues presenting his own collections during Milan *prêt-à-porter* Fashion Weeks, and the relationship with Hilton-Vestimenta is not highly visible.

The company is a family business, and since an important part of revenues derives from licensing agreements, the promotion of own brands is not considered a priority. In periods of downturn, as was the recent post-September 11<sup>th</sup> crisis, the advertising budget was cut. Public relations are thus important, since they permit to achieve a visibility that reduced advertising does not permit to obtain. In Italy, the company has an external pr consultant, who has been with the company for a very long time. In the US subsidiary, an in-house press officer takes care of the North American market. In Japan, the company has an agreement with its importer, which has its own PR staff. All local PR staffs are coordinated by the Italian Head Quarter's marketing manager. For every collection, a number of "total looks" are pre-selected by the company to be pushed for placement within fashion services. This pre-selection is jointly realized by Mr. Del Verme, the marketing manager, and the public relation consultant. These products are selected on the basis of their innovativeness. For each of the company's main export markets, around 30 "total looks" are selected, yet they are not always the same. For example, the collection for the Italian press is the trendiest. In the USA, the products chosen are more classic. The collection for the Japanese press is middle-way between Italy and Japan: neither excessively fashionable, nor too classic.

Most of the advertising investment, as shown in Table 10, is realized in Italy. Advertising "pushes" men's collections, whereas media coverage is concentrated in women's collections (see Table 11).

**Table 10 – Hilton-Vestimenta: Advertising and Media Coverage (Selected countries, 2003)**

Country	N. Advertising pages	Magazine coverage	
		N. Placements	N. equivalent pages
France	0	0	0
Germany	0	4	1.18
Italy	29	139	33.86
UK	0	1	0.03
USA	12.33	36	5.65

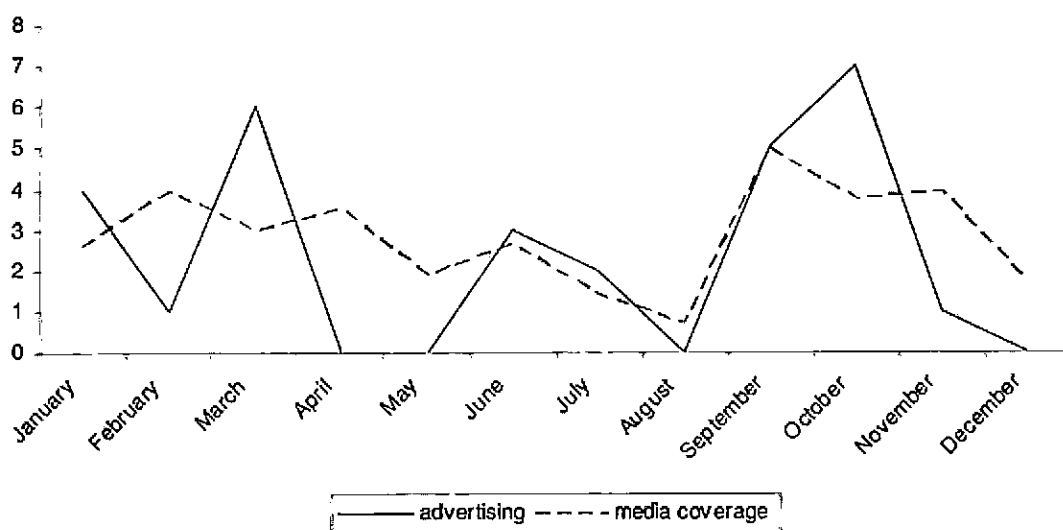
*Source:* Elaborations on Visual Box data.

**Table 11 – Hilton-Vestimenta: Advertising and Media Coverage by gender (Italy, 2003)**

Country	N. Advertising pages	Magazine coverage	
		N. Placements	N. equivalent pages
Man	24	71	14.20
Unisex	1	4	1.15
Women	4	64	18.51
<b>Total</b>	<b>29</b>	<b>139</b>	<b>33.86</b>

*Source:* Elaborations on Visual Box data.

**Graph 9 – Hilton-Vestimenta: Advertising and Media Coverage (Italy, 2003)**



Source: Elaborations on Visual Box data.

#### 6.2.10. Forall Group (Pal Zileri)

Pal Zileri is the brand name under which all products realized by the Forall Group are promoted and distributed. Although the brand seems to be a *griffe*, i.e., a designer label, actually no Mr. Zileri exists, and the company's collections are developed by a team of young designers who do not have a public role. Italy represents the great part of the company's revenue; the company is however distributed in most European countries. In the past, the company used to present its men's collections with fashion shows during Milan's *prêt-à-porter* fashion week but it has discontinued doing so. Export markets are followed by external PR agencies. In Italy, the PR agency is in Milan, since it would be difficult for the company, from its HQ in Veneto, to keep the contact with editorial staffs. All the network of PR agencies is centrally coordinated by the company's marketing & communication manager. Each of the PR agencies has a "mini-collection" within its show room. The composition of these mini-collection is chosen carefully country by country. Attempt to adapt it to local tastes are made. Thus, for example, "in London, where there are many social events, we'll choose a tight or a suit in Prince-of-Wales, that in Russia wouldn't really go". Yet, at the same time, the company tries not to distance itself too much from the Italian style.

Media coverage is considered highly important, since the company's advertising budget, which is very limited outside of Italy (see Table 12), would not permit high level visibility. As nicely expressed by the company's marketing & communication manager, "our company needs to appear in fashion services, yet it is difficult because we "fight" against company which are much richer than we are". The choice to rely on local external agencies is motivated by their personal relationships with local media, that permits, with some difficulties, to obtain coverage beyond the "rule of reciprocity". Actually, local agencies are evaluated and retained on the basis of their ability to obtain

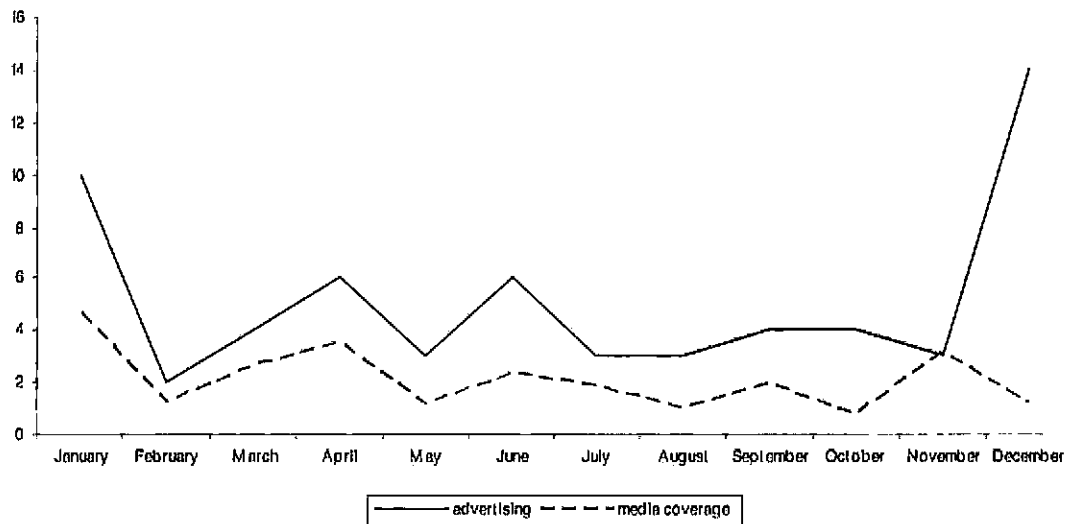
coverage also in absence of advertising. Of course, judging from the data available (see again Table 12), their success is however limited.

**Table 12 – Pal Zileri: Advertising and Media Coverage (Selected countries, 2003)**

Country	N. Advertising pages	Magazine coverage	
		N. Placements	N. equivalent pages
France	0.10	7	1.40
Germany	0	10	2.05
Italy	62	110	25.24
UK	3	8	1.11

*Source:* Elaborations on Visual Box data.

**Graph 10 – Pal Zileri: Advertising and Media Coverage (Italy, 2003)**



*Source:* Elaborations on Visual Box data.

### 6.2.11. Canali

The company was founded in 1934, when brothers Giovanni and Giacomo Canali started their handicraft clothing workshop in Lombardy. In the 1950s, under the family's second generation management, Canali consolidates its presence in the domestic market. In the 1970s, the company starts its internationalization process and, by 1980, it exported half of its production. Nowadays, Canali is a third-generation family business, with 7 plants, all located in Italy and coordinated by the company's Head Quarters in Sovico, with export sales that represent 75% of turnover in 80 different countries. Some of these geographical markets are managed with the help of local subsidiaries in Netherlands, France, Germany, UK, Sweden, Spain, Switzerland, USA, Canada, Hong Kong, Japan. In some of these countries, the company also has flagship stores, that are also employed to monitor local consumer tastes.

At Canali, collection development is realized by a team of in-house designers, that however do not have a public role. The company's spokespersons are the CEO and,

more frequently, the brand image managers, both members of the Canali family. As far as the public role that designers enjoy at other companies is concerned, Canali has a very clear attitude. As clearly expressed by the company's brand image manager, "in other companies, designers want to be protagonists. They want to appear for personal reasons... Here, we leave the product talk by itself". Although not actively engaged in VIP relations, the company has woven ties with the US motion picture industry, with the purpose of outfitting well-known male actors that are thought to represent Canali style. The list of these actors includes, among others, John Travolta, Ben Affleck, Vin Diesel, Robert de Niro, Al Pacino, Campbell Scott, Gene Hackman, Val Kimer.

In the 1980s, the company presented its collections with still-life presentation during Milan men's Fashion Week. Since then, Canali has however discontinued doing so, and decided to concentrate on commercial efforts. Nowadays, collections are presented in the context of the trade fair Pitti Uomo, with a stand among the biggest in the fair. The company's advertising budget is mostly invested in Italy (see Table 13). Public relations are taken care of by external agencies that manage the contact with local editorial staffs, with the coordination of the company's HQ. The internal communication staff is composed of two people only.

The press collection is composed of the products most ordered by retailers, that are pushed with both advertising and public relations, in order to stimulate sell-out. Yet, this is not an absolute rule, particularly for products that are not "photogenic", and mediations between communication and commercial objectives are possible. The pre-selection is realized in Italy, at the corporate HQ, on the basis on intuition. It is, with minor exception, standard for all the many countries where the company is present. As nicely put by the company's Brand Image manager: "We are present in 80 countries, so it is difficult to take into consideration each country's tastes". Both press collection and look books are sent to the network of local public relations agencies, that operationally manage the relationships with editorial staffs.

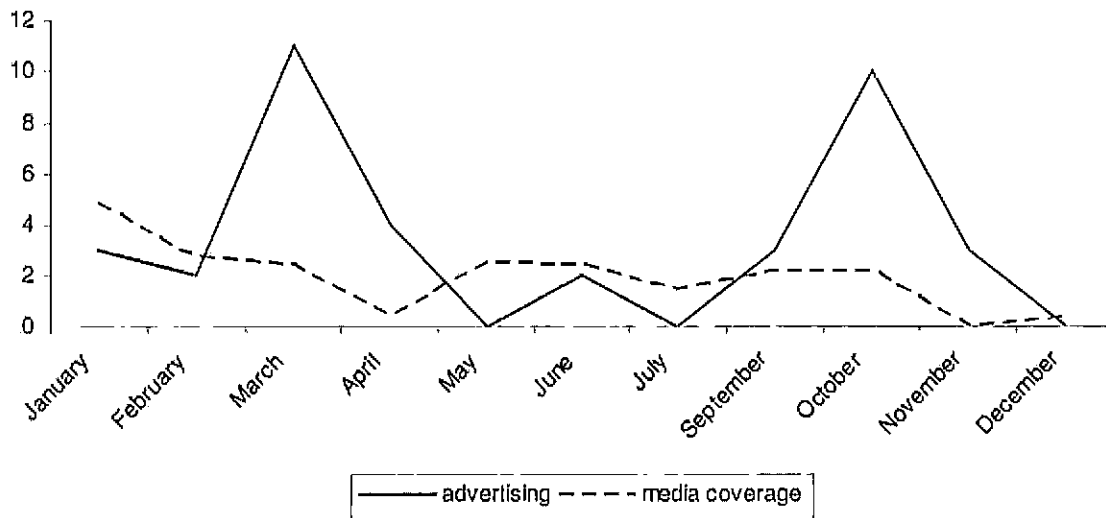
Although in Italy the "exchange ratio" between advertising and coverage is lower than 1:1, in some of the foreign markets (e.g., UK, USA) Canali is able to obtain a significant coverage with a very limited advertising investment (see again Table 13).

**Table 13 – Canali: Advertising and Media Coverage (Selected countries, 2003)**

Country	N. Advertising pages	Magazine coverage	
		N. Placements	N. equivalent pages
France	0	2	0.33
Germany	4	12	1.42
Italy	38	98	21.27
UK	2	63	11.14
USA	6	43	8.85

*Source:* Elaborations on Visual Box data.

**Graph 11 – Canali: Advertising and Media Coverage (Italy, 2003)**



Source: Elaborations on Visual Box data.

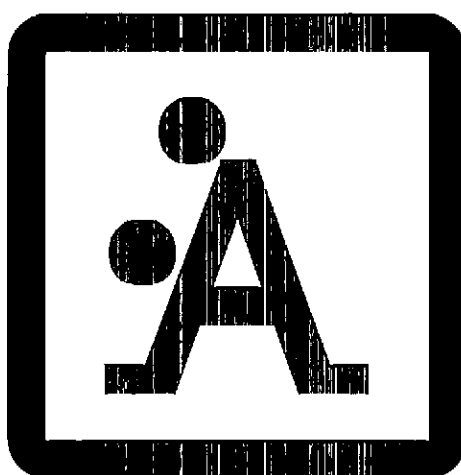
#### 6.2.12. A-Style

The company, founded in 2003, is an entrepreneurial start-up that has enjoyed considerable success because of its unconventional promotional practices, which are based on the multiplication of the visibility of the logo created by the Milanese entrepreneur-founder, Marco Bruns (see Picture 8). The logo actually predates the foundation of the company: it was invented in 1990, shown by Mr. Bruns to its circle of friends, who appreciated it, and forgotten soon after. In 1999, however, while during a vacation trip with a group of friends, they decided to adopt a recognition symbol, and the logo was employed to this end. Some stickers displaying the logo were realized and, when Mr. Bruns realized that people actually liked it, he registered it as a trade mark. In 2000, as a joke, Mr. Bruns and his circle of friends started sticking the logo on traffic lights, both in Milan and, to a lesser extent, in other European towns. This created curiosity around the logo, and led some individual consumer to produce, on their own, t-shirt displaying it. Mr. Bruns thus realized the commercial potential of his logo, and decided to start producing his own t-shirts and continuing promoting them with the help of similarly original communication tools (i.e., no advertising, no media coverage). External designers develop the new collections, but they do not have a public role. The multiplication of visibility, coupled with the fact that the logo attracts the attention and is easily remembered, probably explains the great increase in turnover that this very young company has enjoyed since its foundation (see Table 14). Products, mostly t-shirts, are presently distributed also in Spain, Germany, France, Benelux, and more recently Japan.

Nowadays, Mr. Bruns has licensed the production of A-Style products to an industrial partner and, as a pure brand-owner, is only responsible for its promotion. VIP relations are important for the logo visibility. The company has now several agreements with television wordrobers, to place products on music programs conductors, and with celebrities. Before that, however, some celebrities decided to wear A-Style t-shirts on

their own initiative, and this contributed to the early popularity of the logo. According to Mr. Bruns: “Celebrity endorsers are very useful. I was very lucky, since some personalities wore my T-shirts spontaneously and their images were diffused by the media... We received a lot of visibility from that”. Further, “the important is that the celebrity wears items of cloth even outside of the TV environment, so that people may understand that he does so because he really likes them, not because he is under contract”. So far, A-Style has obtained a limited coverage in traditional media, and has not relied on advertising. Further, no attempts to influence magazine coverage have been made. Things are however going to change in the near future. In 2005, the first advertisements will be placed in Italian magazines, which will be of course brand-based, and will not show individual products.

**Picture 8 – The A-Style logo**



**Table 14 – A-Style: Evolution of sales**

Reference season	Sales	
	N. of products	Turnover
Spring/Summer 2003	15,000	€ 375.000
Autumn/Winter 2003	39,000	€ 940.000
Spring/Summer 2004	90,000	€ 2.100.000
Autumn/Winter 2004	130,000	€ 3.600.000
Spring/Summer 2005	200,000	€ 4.900.000

*Source:* Elaborations on A-Style data.



## Conclusion

Unlike other disciplines that have investigated the role of expertise in society, marketing scholars have adopted a more focused approach and have mostly conceptualized opinion makers as specialized sources of information likely to influence the success and diffusion of products and services. This was my starting point when I structured my literature review and when I entered the field for my preliminary investigation. The way I framed my quantitative study heavily reflects my initial view. Yet, as I entered the field again for my qualitative study, and shifted my attention from quantity of coverage to its quality, I found myself increasingly aligned with a view of opinion makers as key agents who intervene in the cultural processes through which the symbolism of consumer goods is constructed, as proposed by authors such as McCracken (1986) and Hirschman (1986). Fashion companies, through product design and their communication activities, have developed sophisticated manners to infuse their products with desired symbolism. The interpretations and selection decisions of fashion journalists may allow desired meanings to pass through, strengthening or weakening them, or block them entirely and substitute them with alternative, own-generated, meanings. Fashion companies have in turn developed tactics to constrain their interpretation and to limit their coverage decisions, so that coherence with brand image is ensured.

As a whole, my research findings were as follows. Firstly, in the fashion industry, *advertising matters*. The more a company advertises, the greater its coverage. The rule of reciprocity, that prescribes that advertisers will receive a favorable treatment by editorial staffs, is nowadays institutionalized and, although national and individual differences exist among publishing houses, advertising investments have to be taken into consideration when evaluating fashion companies' performance in terms of the coverage their products receive in magazines. That said, two companies with the same number of advertising pages may enjoy rather different levels of coverage: other factors play a role in determining the *exchange ratio* between advertising pages and visibility in editorial content. For some companies, such ratio is much lower than 1:1, for others, instead, it is much greater, as also shown by the case-studies I investigated. Companies

that have celebrity designers, that are liked by VIPs, that belong to the high fashion market segments are those that are more likely to benefit from their promotional budgets and, in some cases, even enjoy heightened coverage with very modest advertising investments. On the other hand, industrial brands, whose collections are developed by designer without a public role, and with limited celebrity endorsement, are less likely to benefit from their advertising budgets, no matter how sizeable.

From a different perspective, I also showed that in the fashion industry, *public relations matter*, too. PR practitioners have relation capital, that grows with experience and is often attached to the individual, rather than the organization. The interactions between fashion journalists and PR practitioners are governed by idiosyncratic rules, based on personal exchanges of favors and tacit knowledge, and individual coming from a different professional milieu may find it difficult to “enter” the logic of the system or to accumulate their own relational capital fast enough. Thus, no matter whether internal staff or external consultants, those who deal with public relations have to be well-introduced in the system.

As far as generalizability of empirical findings is concerned, I acknowledge the fact that fashion may be a rather idiosyncratic research setting: yet, many other industries are increasingly becoming symbol-intensive and design-based, and some of my findings may be replicable also in those settings (e.g., think to Philippe Stark as a celebrity designer on his own terms). Results on the role of advertising and public relations in influencing editorial content may hold true also for other typologies of goods and media (e.g., special-interest consumer media, trade magazines, etc.).

From a theoretical point of view, this contribution adds to marketing knowledge in that it employs a “supply-side”, rather than “demand-side” perspective to document both the working routines of opinion makers, and companies’ attempts to influence them. All areas of enquiry that, as shown in my literature review, and so far been understudied by marketing scholars. Moreover, as previously noted, my study extends the “cultural” perspective proposed by McCracken (1986) and Hirschman (1986), since it provide evidence of the role of opinion makers as professionals “whose occupation is

the development of cultural symbols” (Hirschman, 1986). Although the present work is grounded in marketing, the research questions investigated and the empirical results could be of interest also for scholars in other disciplines, including political economists of the media (for the “measurement” of advertiser influence, which is often theorized by hard to measure) and public relation scholars (for the implications in terms of product publicity).

That said, the study suffers from some shortcomings, that were somewhat reduced by the interplay between qualitative and quantitative methods. To name just a few, better measures of product newsworthiness could have been gathered; data about companies from foreign companies could have been considered in order to explore country-of-origin effects. Moreover, upon completing my multiple case-studies, I would have liked to come back to my quantitative study in order to include among predictors some measures of designer celebrity or VIP relations, perhaps based on media content analysis. However, these weaknesses highlight directions for my future research.



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