

Assessing a fragmented media landscape and what it means for your communication strategy

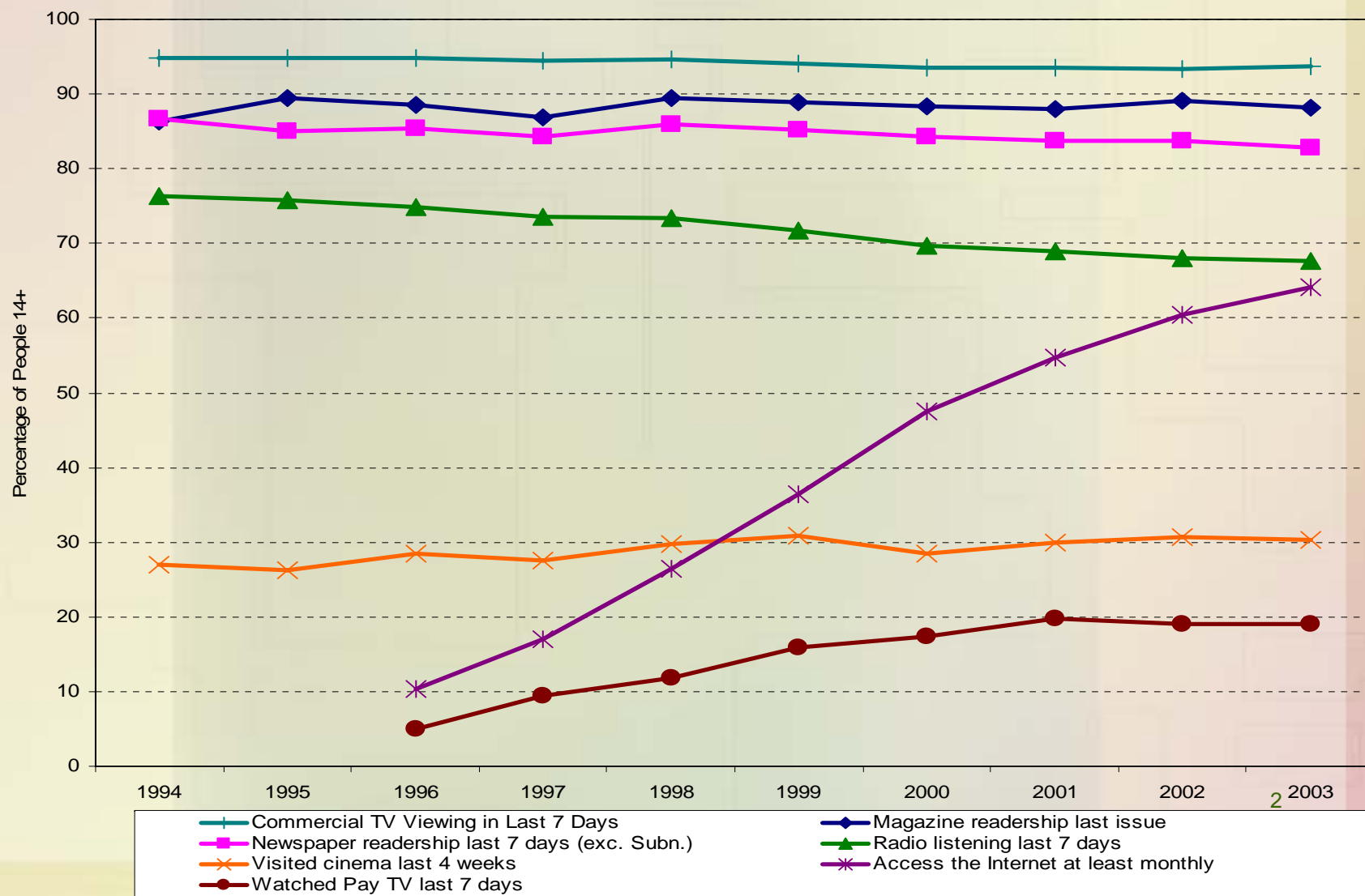
Ken Miller

University of Technology, Sydney



Media consumption changes 1994 - 2003

With an information explosion, and multiple media sources....



Slide 2

R1

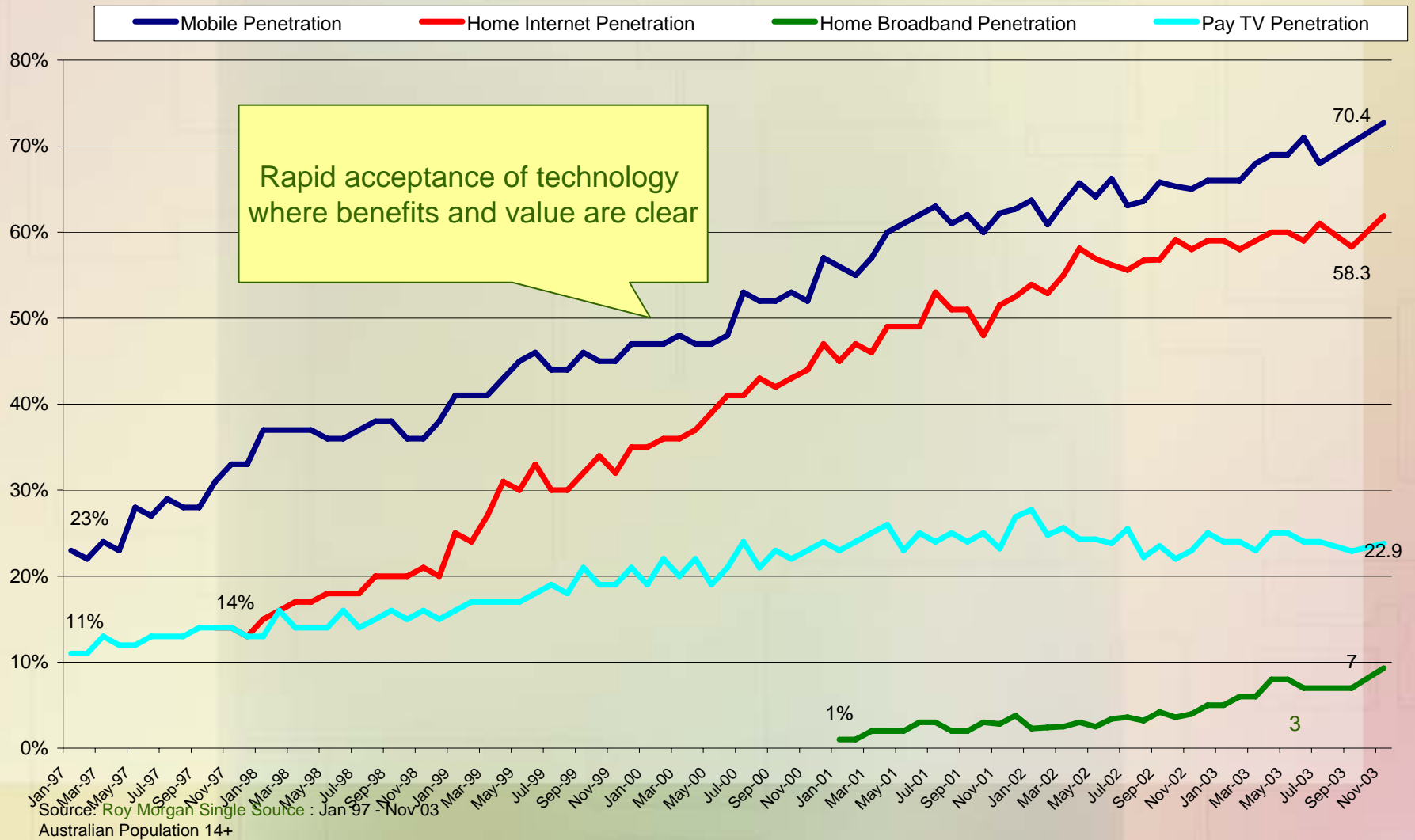
Slide title?

RMR, 31/03/2005

Technology Adoption

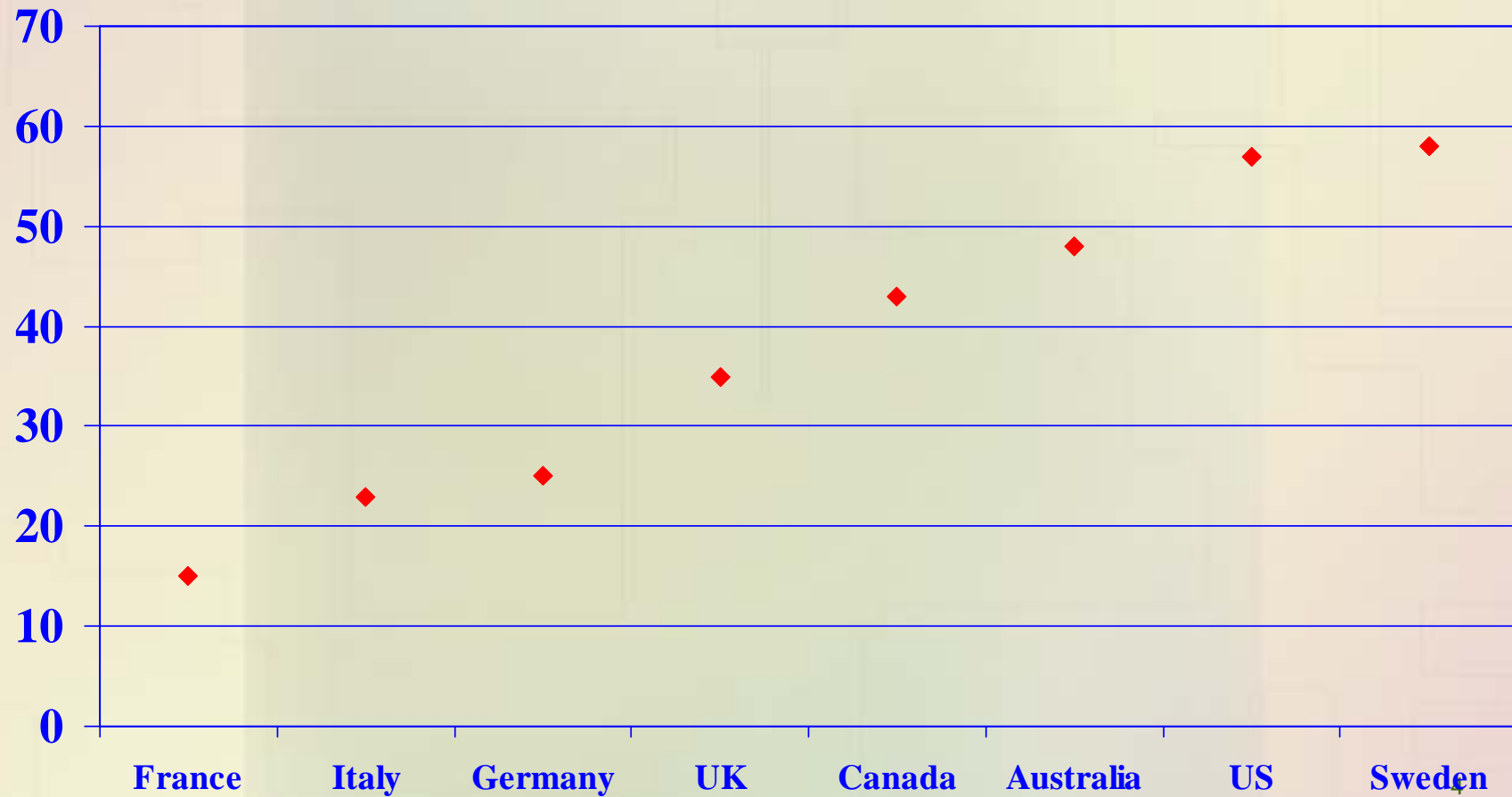
Technology adoption has occurred at a rapid pace

Adoption rates for key technology offerings in Australia

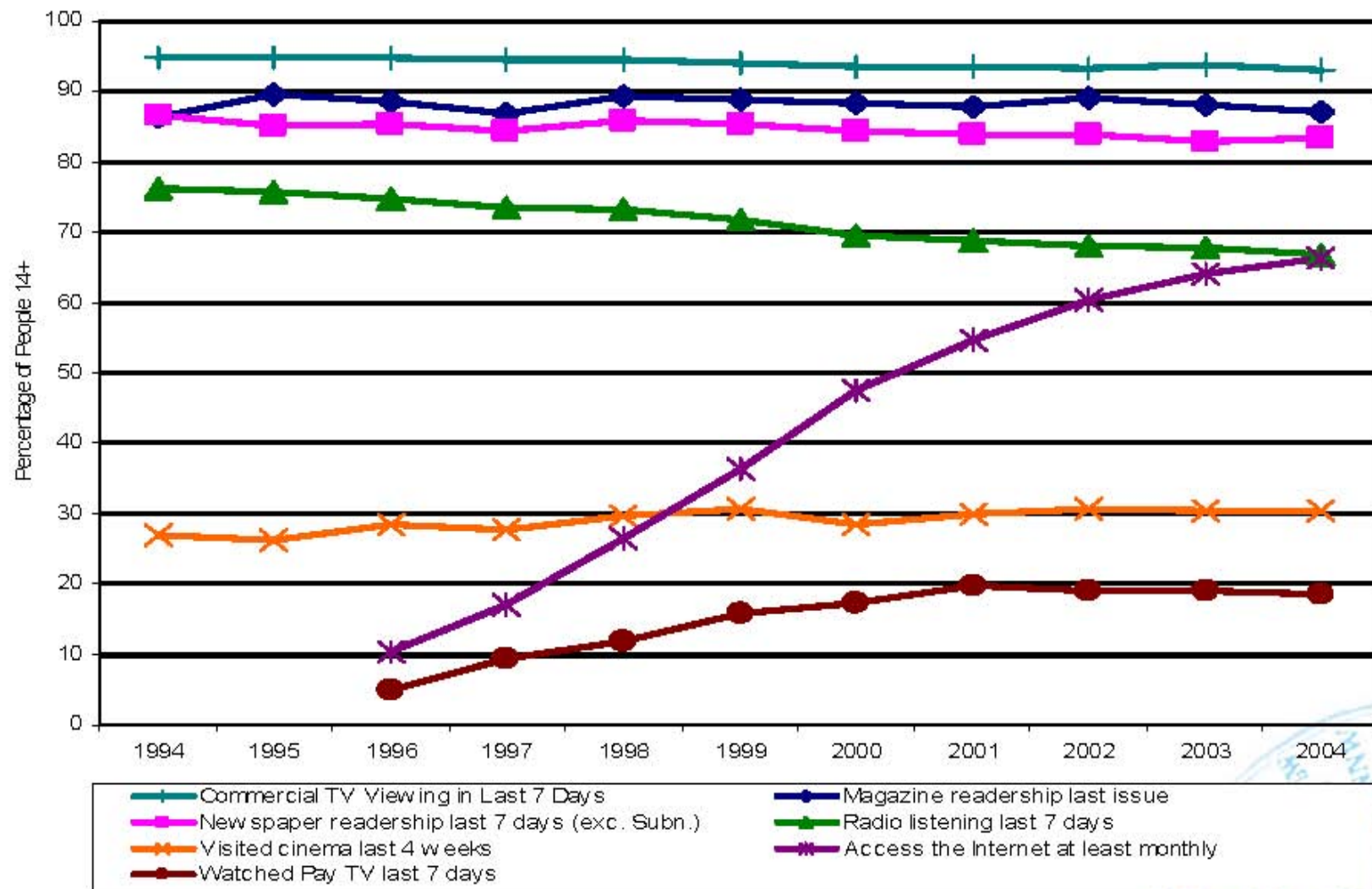


INTERNET ACESS BY COUNTRY, 2000

% of population

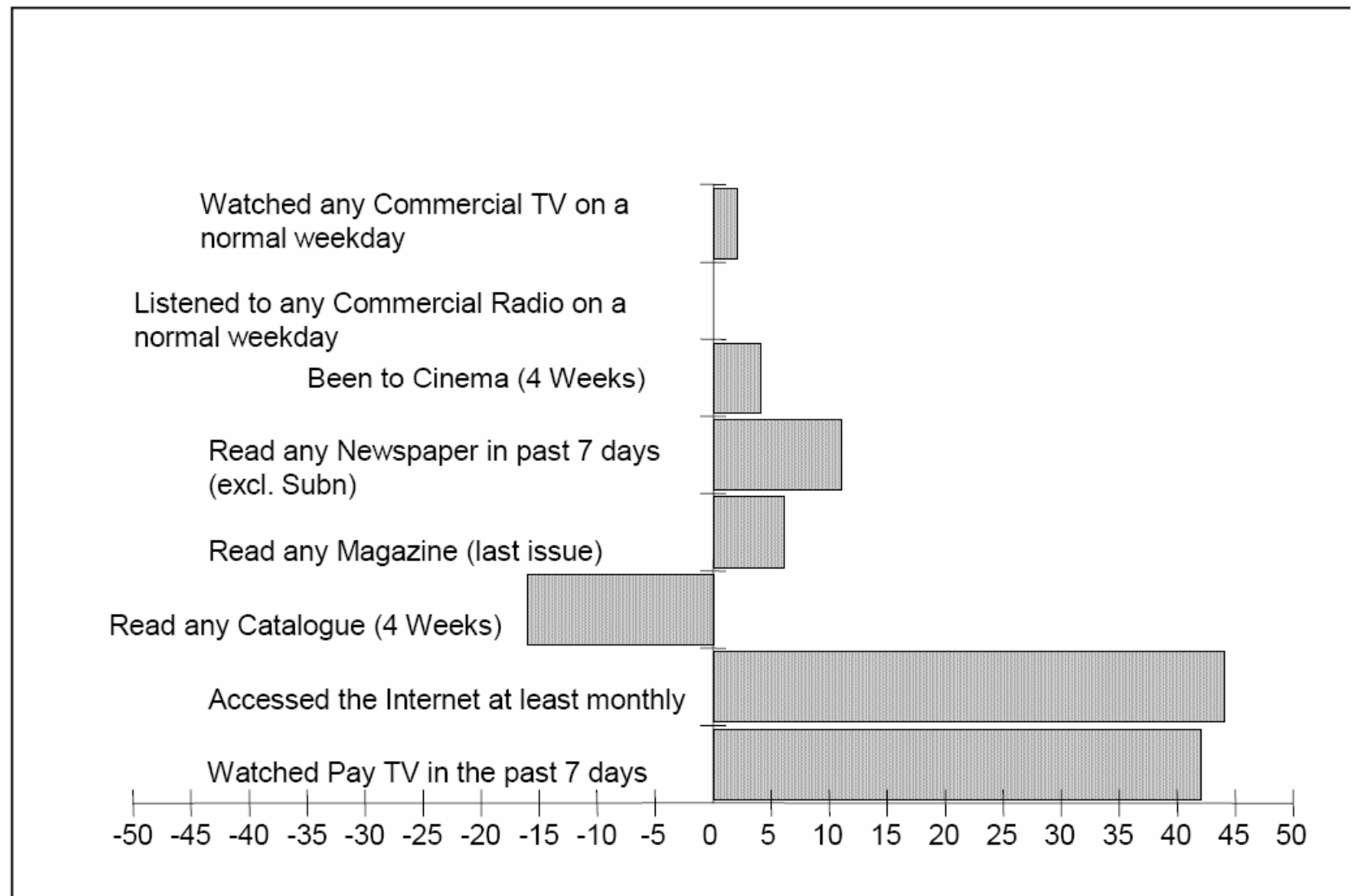


Media consumption changes 1994 - 2004



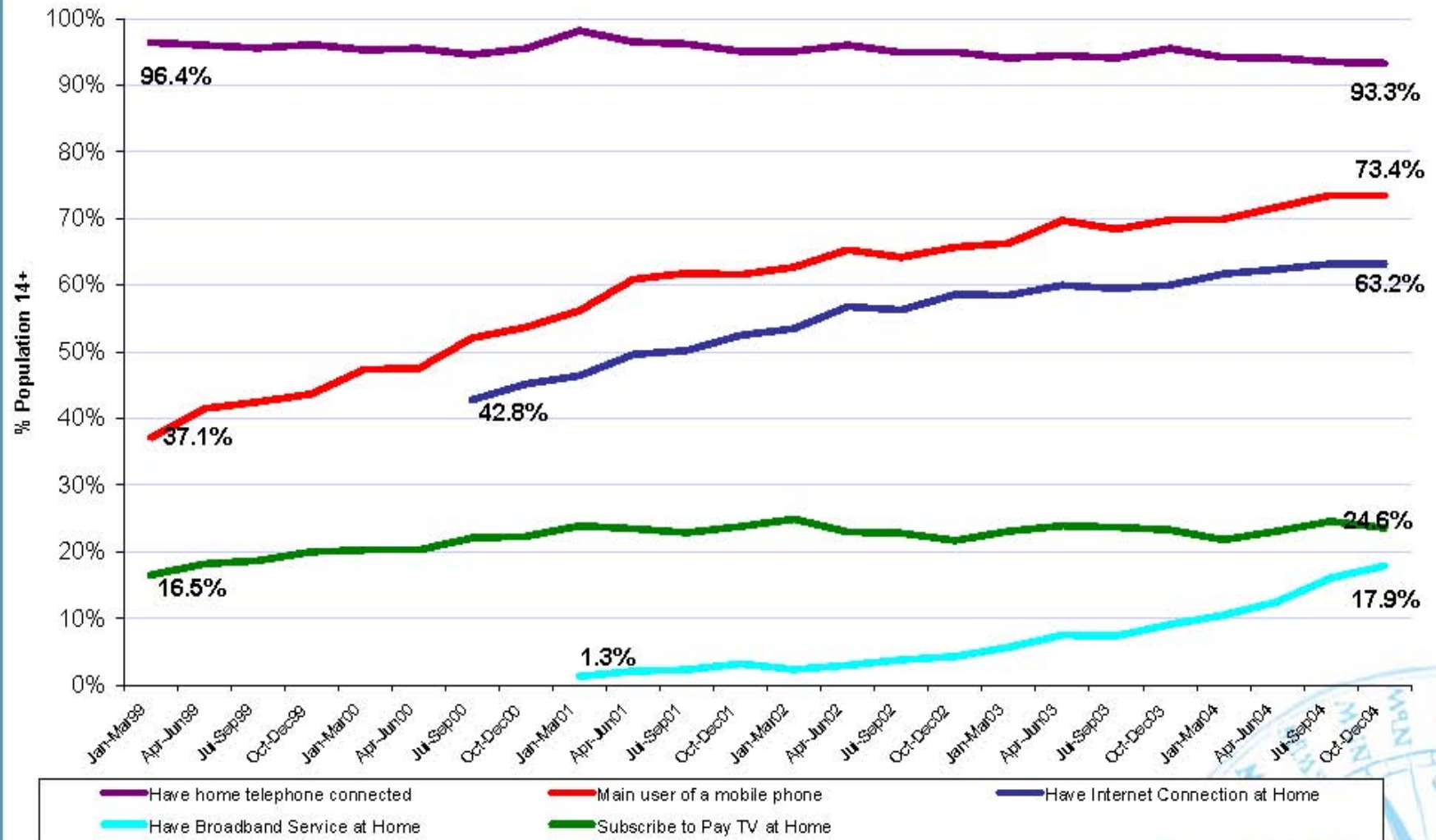
Source: Roy Morgan Single Source Australia 1994-2004

Figure 3: Index of media performance among intending Ford buyers in Australia



Source: Roy Morgan Single Source Australia 2000

Australian Technology Adoption Rates

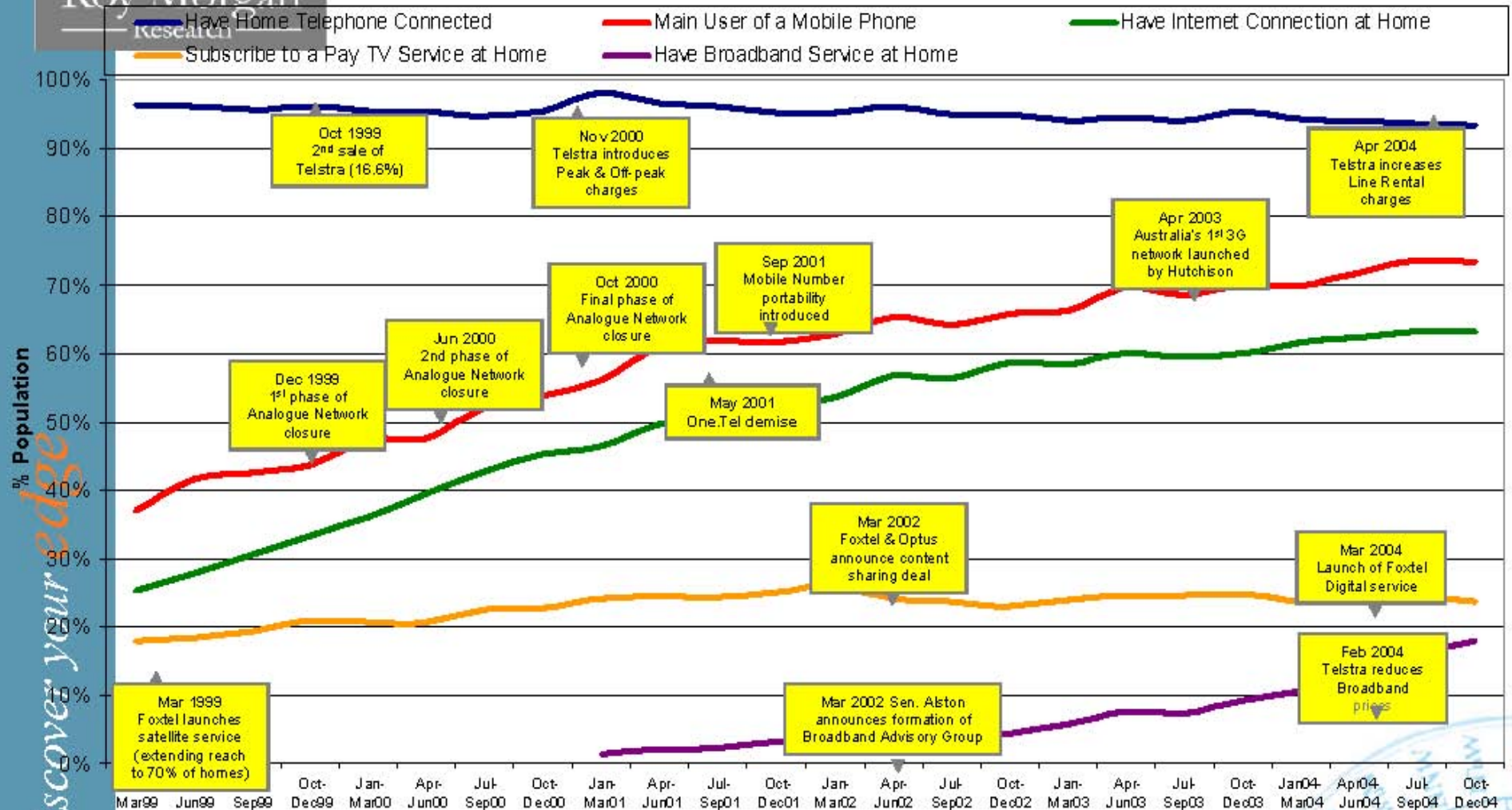


Source: Roy Morgan Single Source Jan 99 - Dec 04

Base: Australian Population 14+ n=148,689 © Roy Morgan Research

Telecommunication Industry Trends (Jan 1999-Dec 2004)

Roy Morgan
Research



Source: RoyMorgan Single Source January 1999 - June 2004

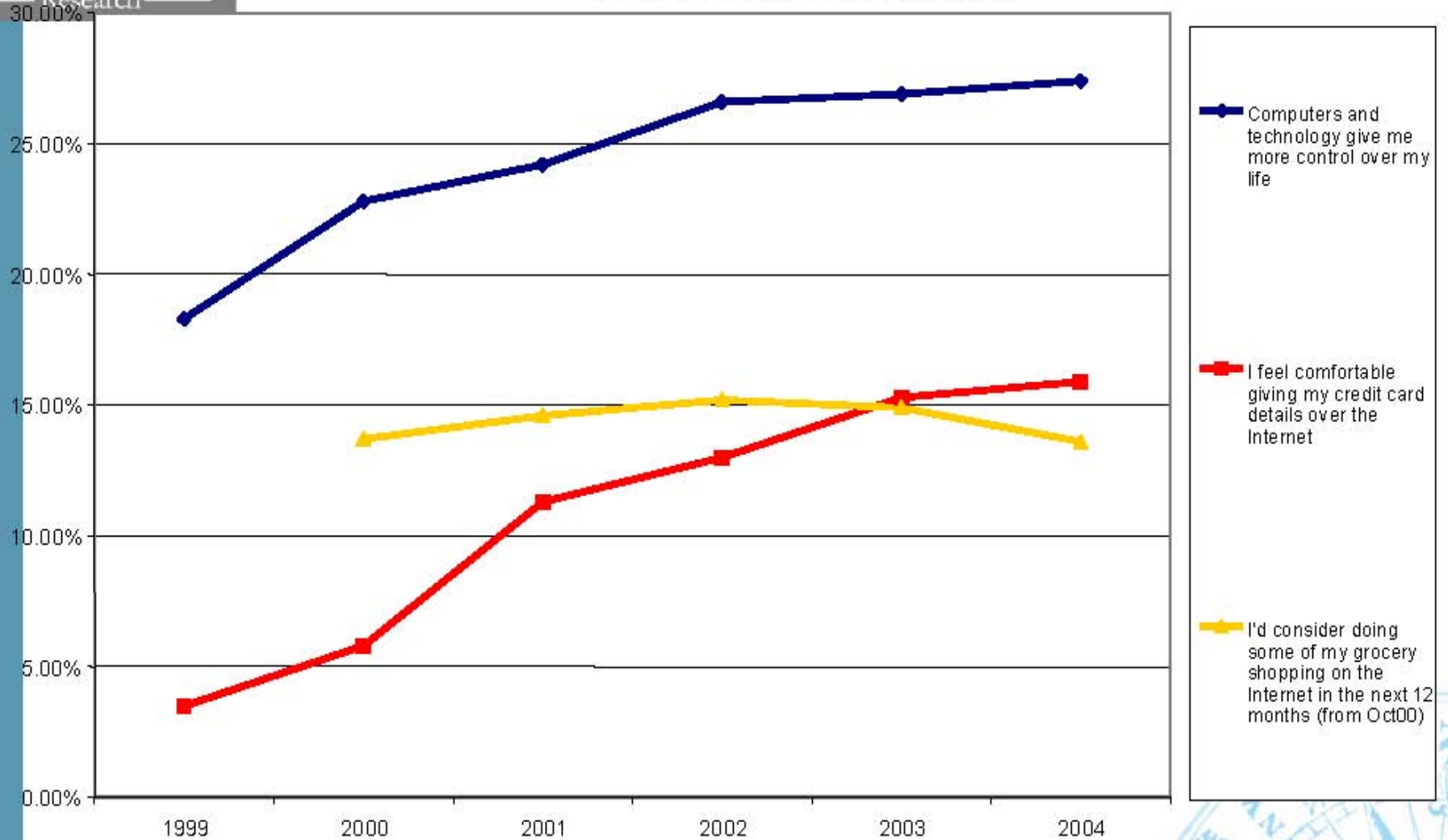
Base: Total Australians 14+; n = 124,173

© Roy Morgan Research

Discover your edge

Internet Attitudes

Discover your *edge*
% of total population

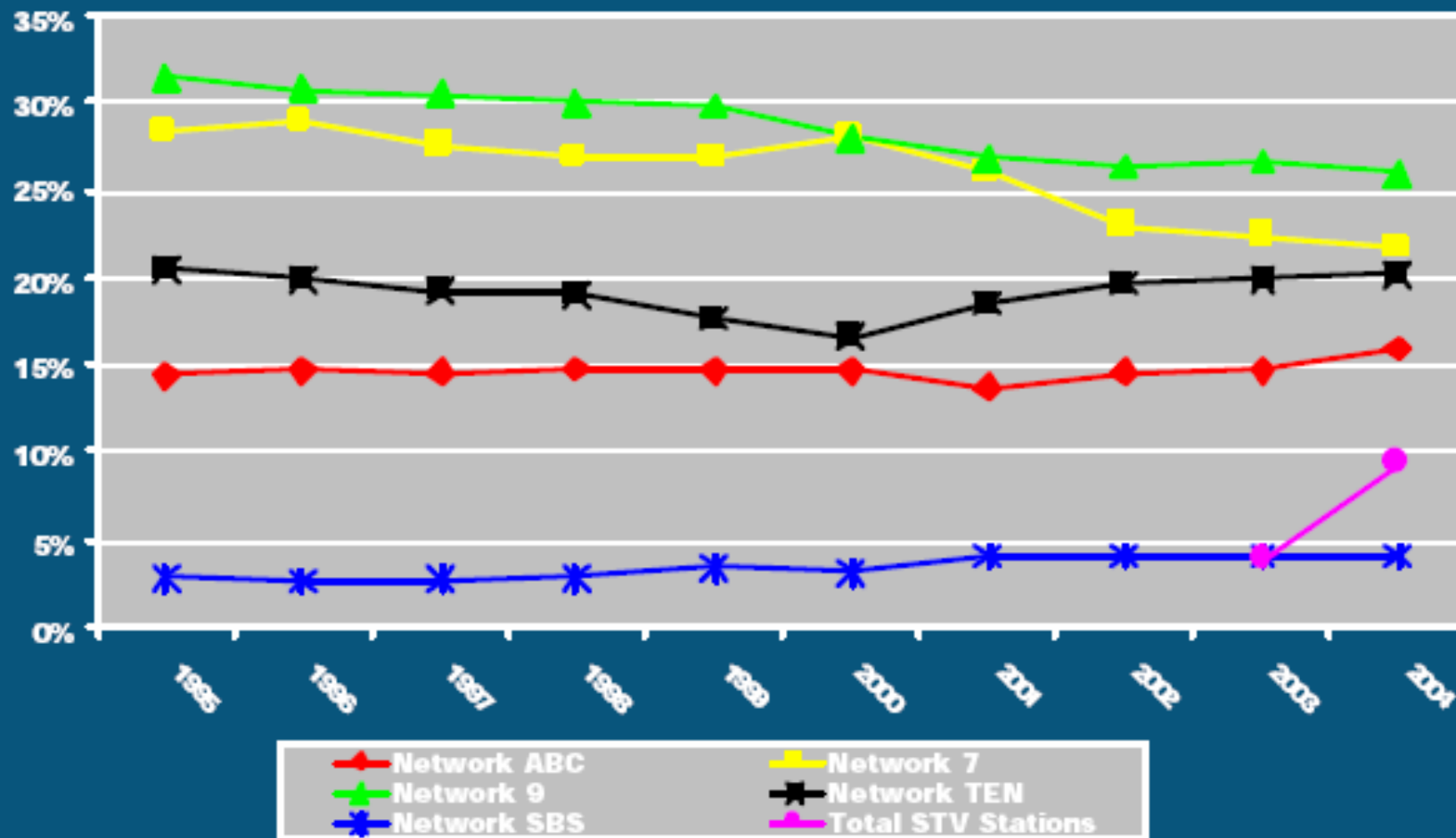


Source: Roy Morgan Single Source January 1999-June 2004

Base: Total Australian Population aged 14+ n=137,001

FTA and Pay TV Shares

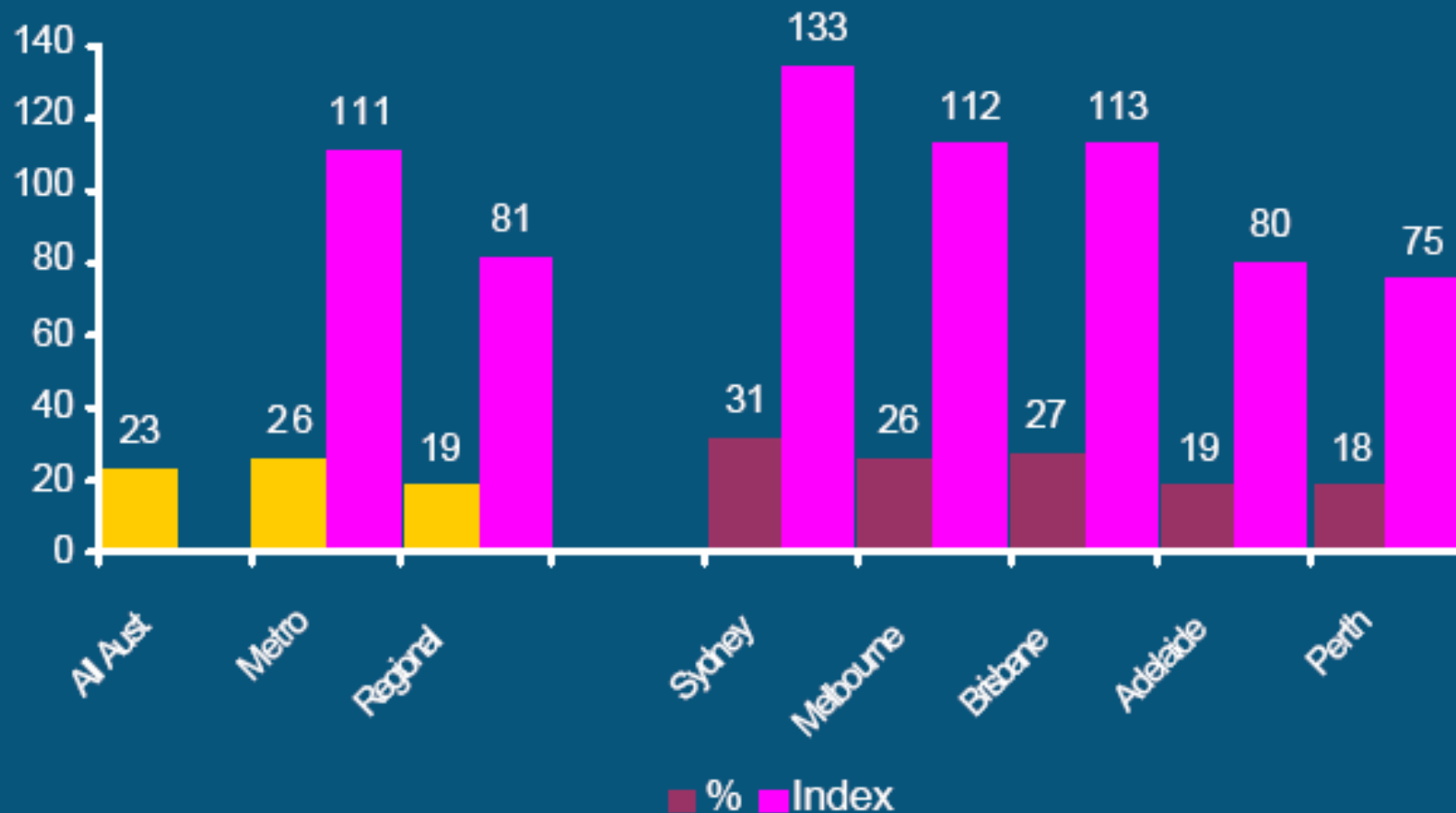
5 caps 1995 - 2004



STV Penetration

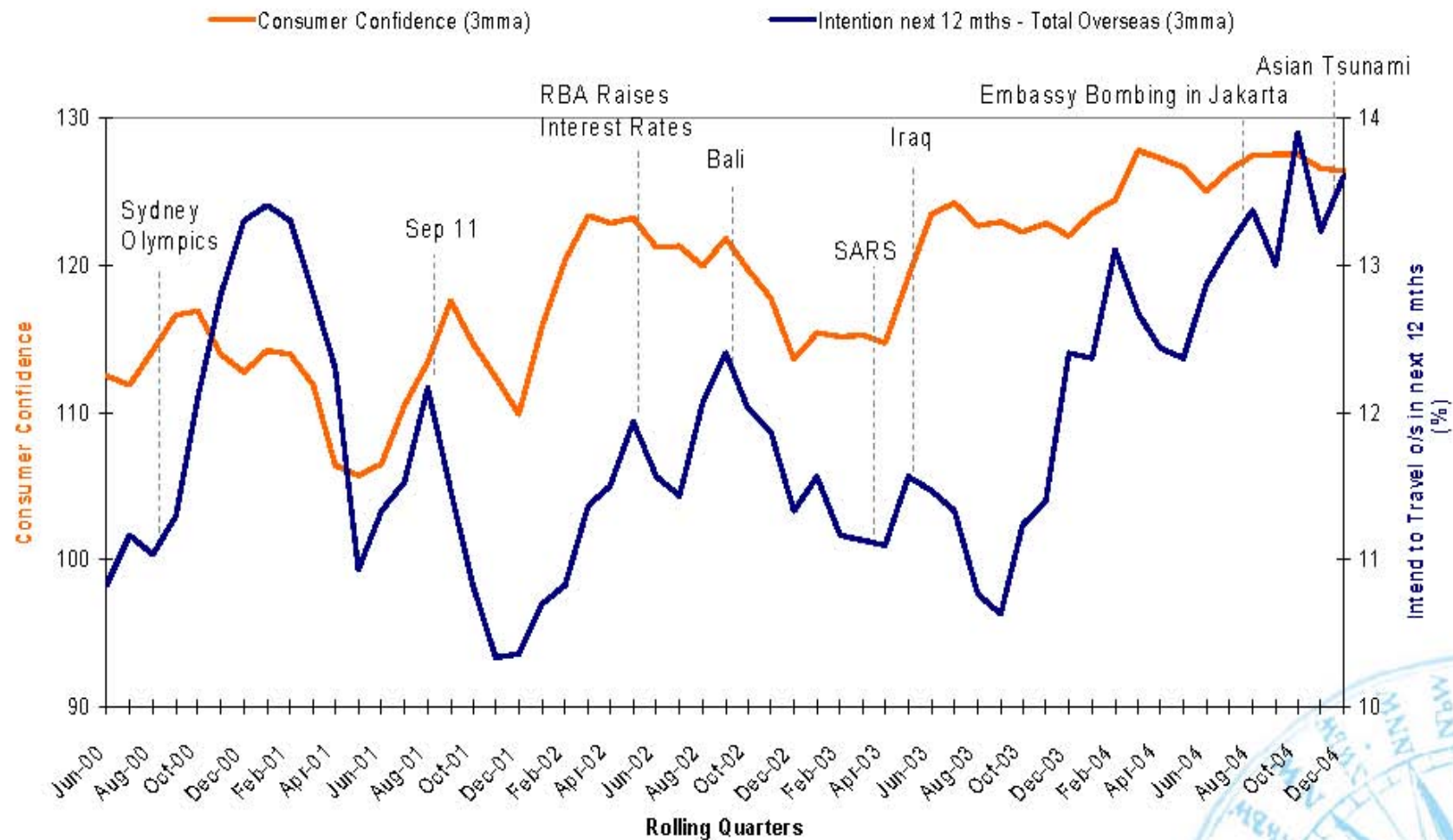
by market 2004

As Australia's most affluent city - Sydney scores highest



Australians' Overseas Travel Intentions

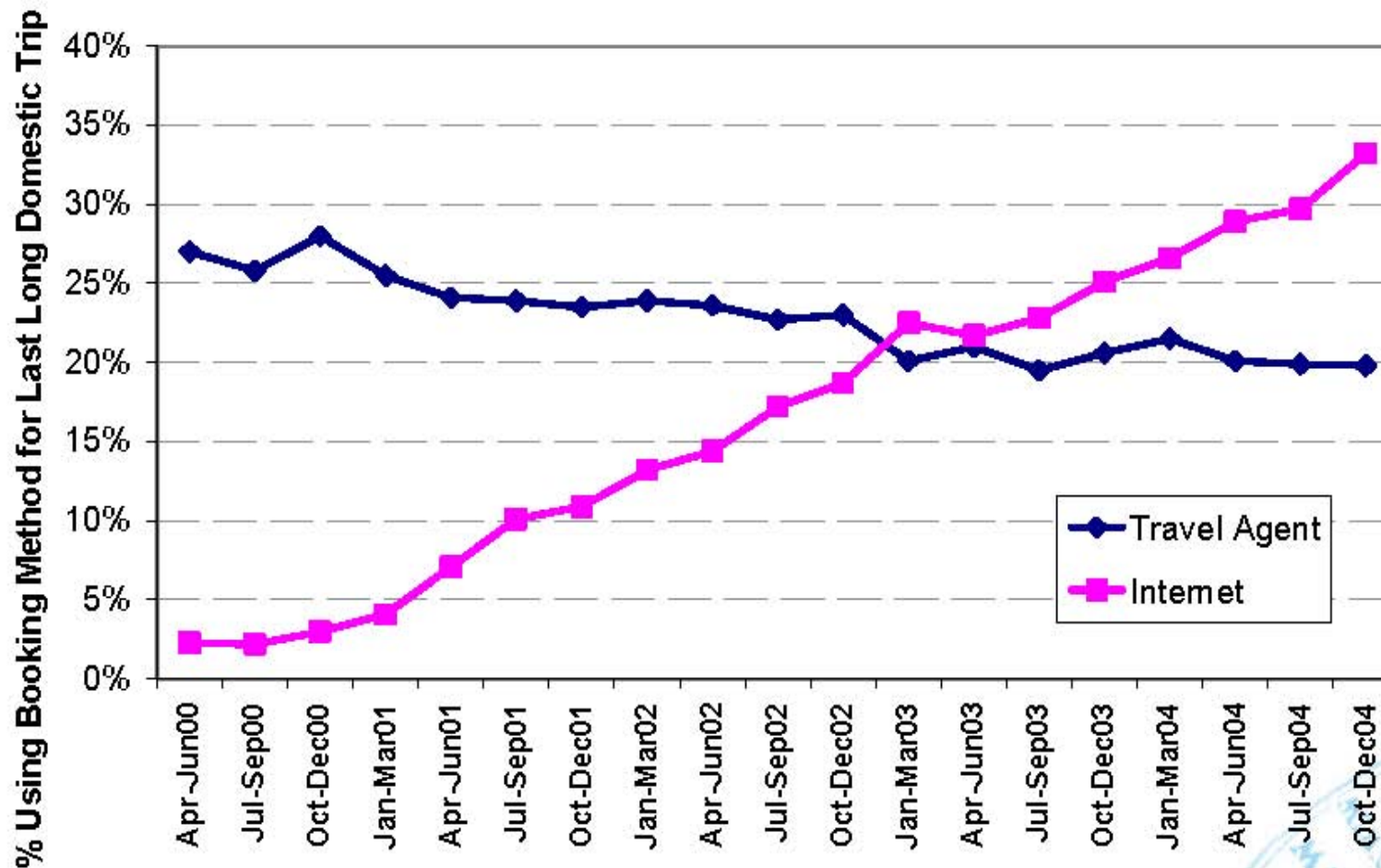
"Intend to Travel Overseas in the next 12 months" and Consumer Confidence
(3 Month Moving Average)



Source: Roy Morgan Single Source Australia - June 2000 to December 2004

Base: Australian population Roy Morgan Single Source Apr 02 - Dec 04: Long Trip Travel Intentions

Holiday Bookings

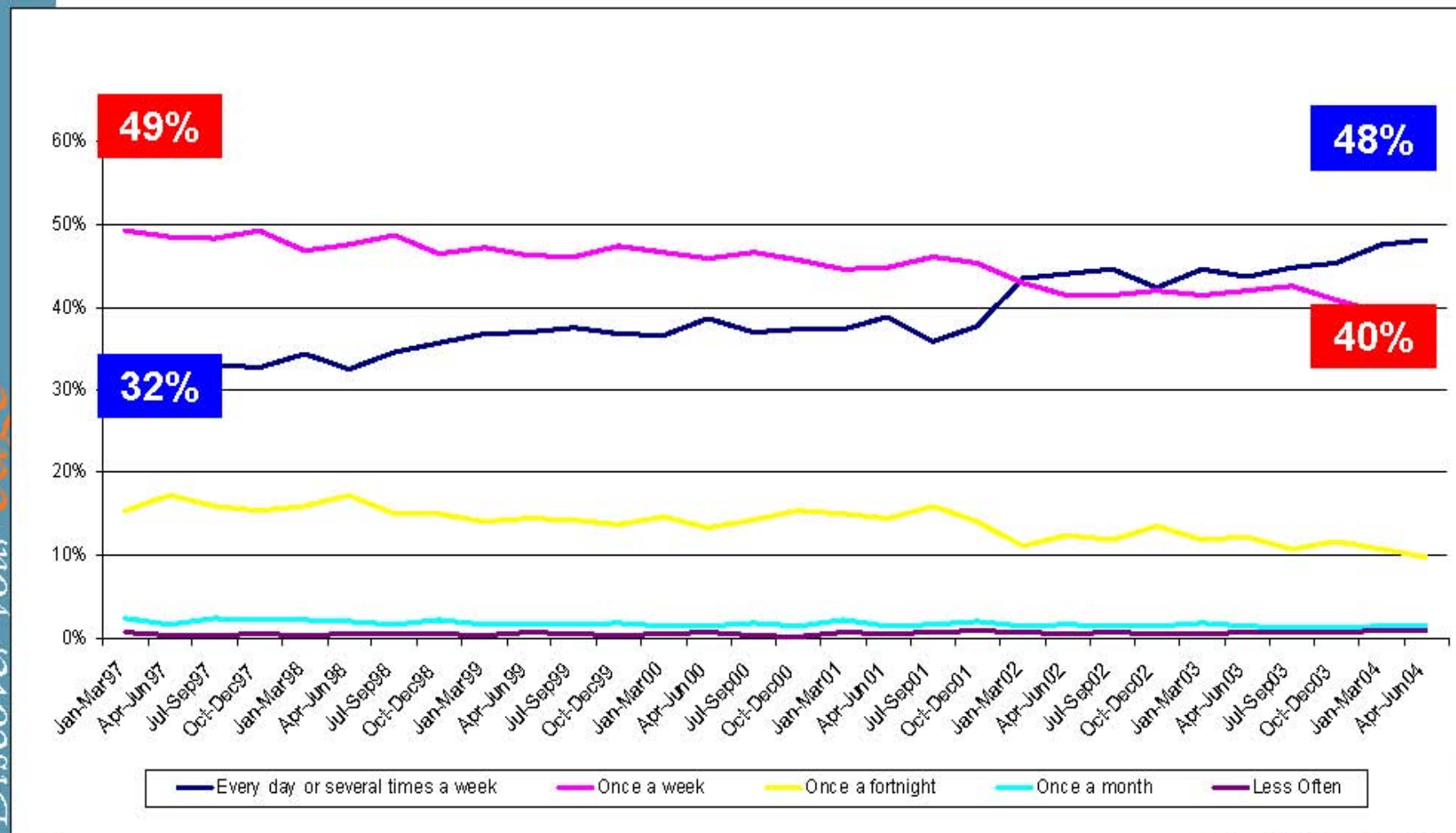


Source: Roy Morgan Single Source Australia Apr 2000 - Dec 2004

Base: Total booked a last long (3+ nights) domestic trip

© Roy Morgan Research

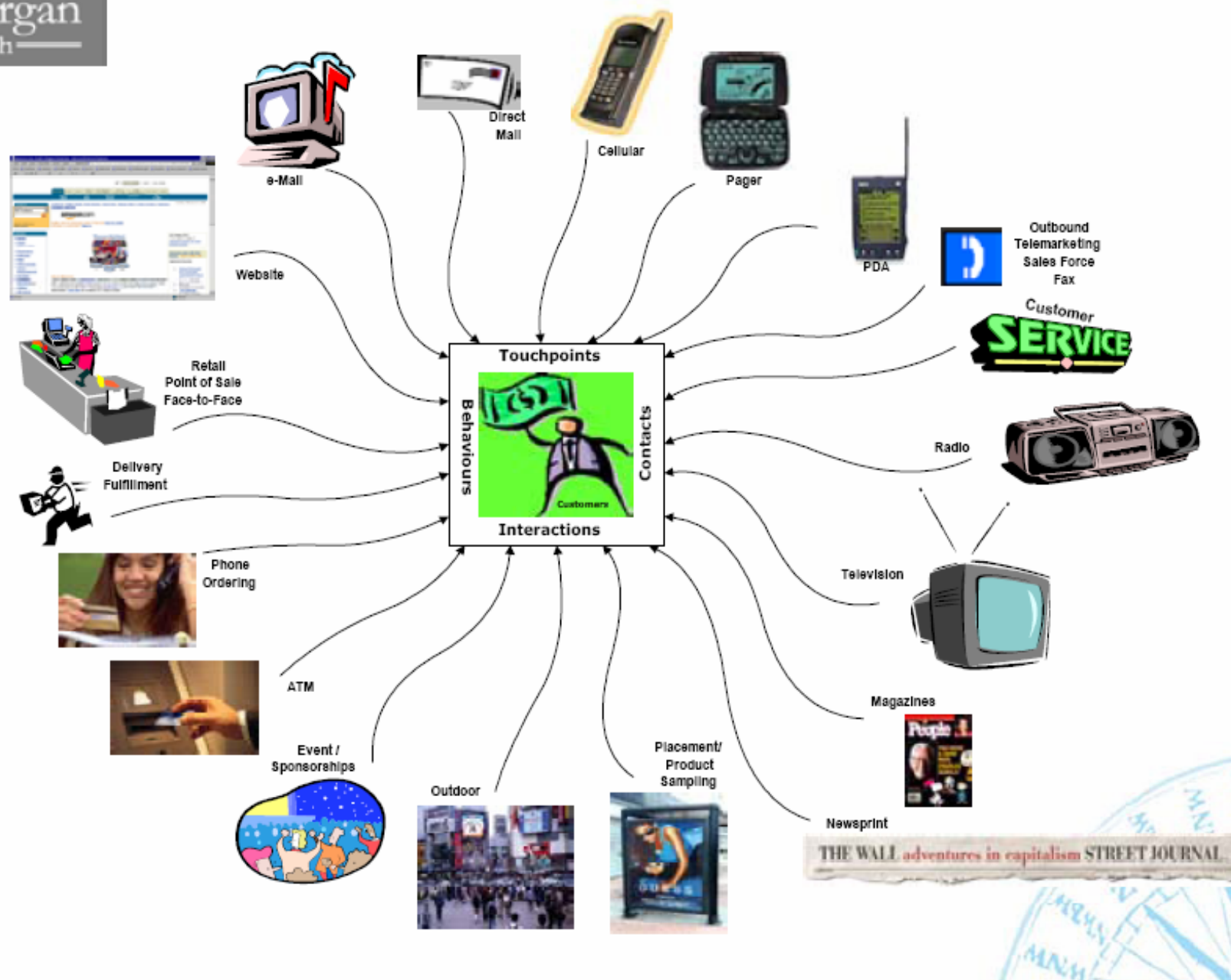
Increasing frequency of trips to supermarket



Source: Roy Morgan Single Source Jan97-Jun04

Base: Grocery Buyers

© Roy Morgan Research



TOTAL SHARE OF ALL NIGHTLY TV VIEWING 6PM TO MIDNIGHT

METRO		REGIONAL	
Seven	22.4	Prime/7Qld	23.6
Nine	25.9	WIN/NBN	28.2
Ten	20.0	TEN/Sthn Cross	18.5
ABC	13.2	ABC	13.3
SBS	4.6	SBS	5.1
FOX Sports	0.8	FOX Sports	1.0
FOX8	0.6	TV1	0.6
TV1	0.6	FOX8	0.6
UKTV	0.6	FOX Sports 2	0.5
FOX Sports 2	0.6	Lifestyle	0.4
FOX Footy	0.5	FOX Footy	0.4
Lifestyle	0.5	Showtime	0.3
FOX Classics	0.4	Discovery	0.3
Showtime	0.4	Disney Channel	0.3
Discovery	0.3	UKTV	0.3
Showtime Greats	0.3	FOX Classics	0.3
Disney	0.3	Movie One	0.3
National Geographic	0.2	National Geographic	0.2
Nickelodeon	0.2	Cartoon	0.2
Arena	0.2	Showtime Greats	0.2
W	0.2	History Channel	0.2
Movie One	0.2	Arena	0.2
Sky News	0.2	Movie Extra	0.2
Showtime 2	0.2	Comedy Channel	0.2
MTV	0.2	W	0.2
Comedy	0.2	Nickelodeon	0.2
History	0.2	Hallmark	0.2
Hallmark	0.1	Sky News	0.1
Movie Extra	0.1	Showtime 2	0.1
Cartoon	0.1	Movie Greats	0.1
V	0.1	Animal Planet	0.1
ESPN	0.1	max	0.1
Animal Planet	0.1	MTV	0.1
Movie Greats	0.1	Channel V	0.1
VH1	0.1	ESPN	0.0
max	0.1	VH1	0.0
Ovation	0.0	Ovation	0.0
CNBC Australia	0.0	CNBC Australia	0.0
Other payTV	2.7	Other payTV	3.2

Source: Compiled by Survey Audits - 15th May to 11 June 2005

More programs
Smaller Audiences

Your typical teenager is

- Instant messaging
- Listening to an IPOD and computer delivered music
- Casting an eye to TV (maybe while doing homework)

Ira Carlin

Nothing will change how advertising is meant to work --exposure of a message with the aim of inspiring some action on part of consumers, whether physical (head to store) or mental (head to store)

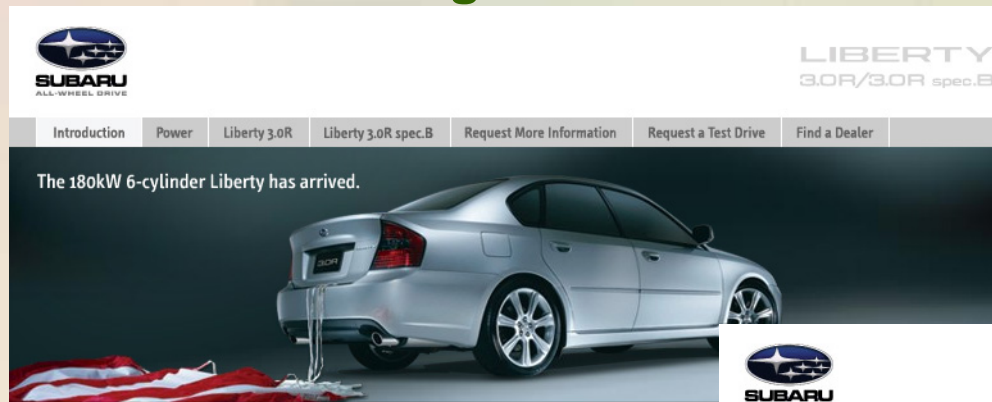
Ira Carlin

The continued challenge is how we continue to build and maintain the brand

Response factors will be low since fragmented media by themselves deliver even lower audiences however we will continue to seek higher relative response

Subaru Liberty Campaign

Online Advertising &



The 180kW 6-cylinder Liberty has arrived.

For the first time, Subaru is offering Liberty 3.0-litre six-cylinder models in two versions – the sportshift automatic Liberty 3.0R and the six-speed manual 3.0R spec.B.

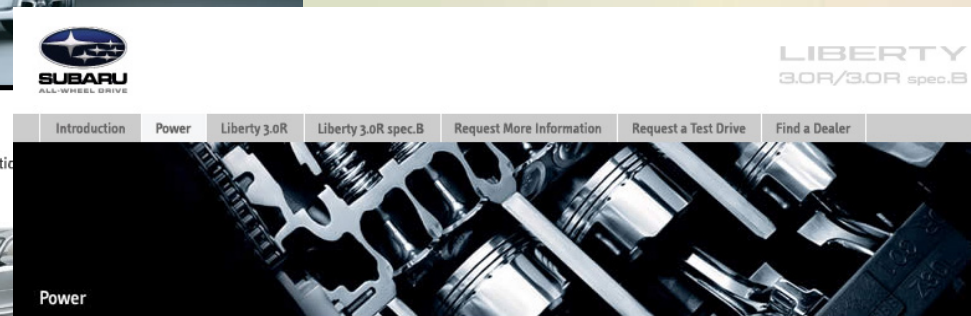
Both are equipped with active and passive safety features such as Subaru superior All-Wheel Drive system, and dual front, front side-airbags and curtain airbags.

[More](#)

Power



Liberty 3.0R Sportshift Automatic



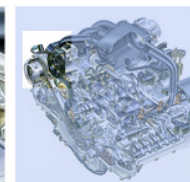
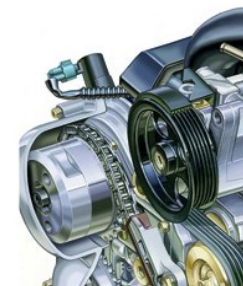
Power

The power and the glory

For the first time, Subaru is offering a six-cylinder engine in the Liberty.

The 3.0-litre horizontally opposed Boxer engine produces 180 kilowatts of power at 6,600 rpm and 297 newtonmetres of torque at 4,200 rpm. This results in an impressive braked towing capacity of 1,800 kg.

[More](#)



Take a closer look
Drag the square above to view a closer image of the engine illustration

[Play Banner Ad](#)

[Play Liberty Microsite](#)

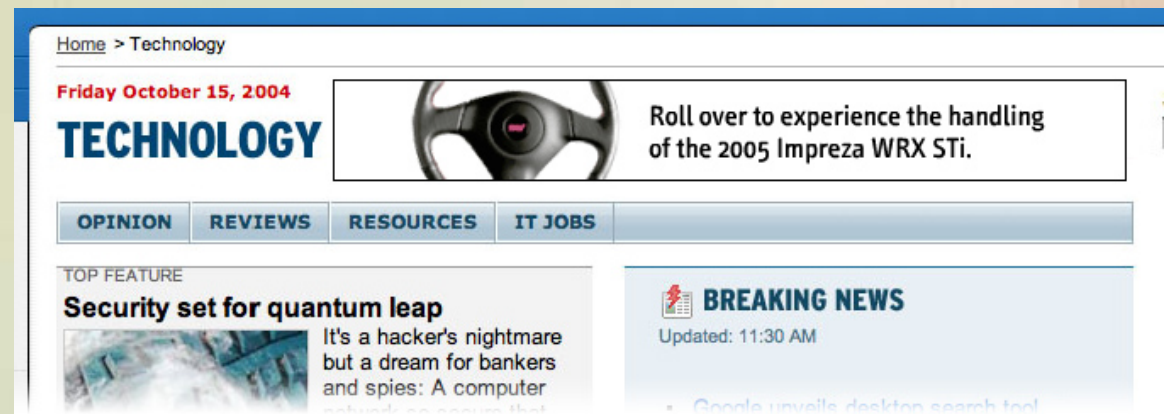
Subaru WRX STi Campaign

- Targeted to car enthusiasts, the STi campaign focus was to generate excitement about the Subaru STi in a highly competitive marketplace
- The banner was also contextually placed on drive.com.au to reach those in active purchase cycle

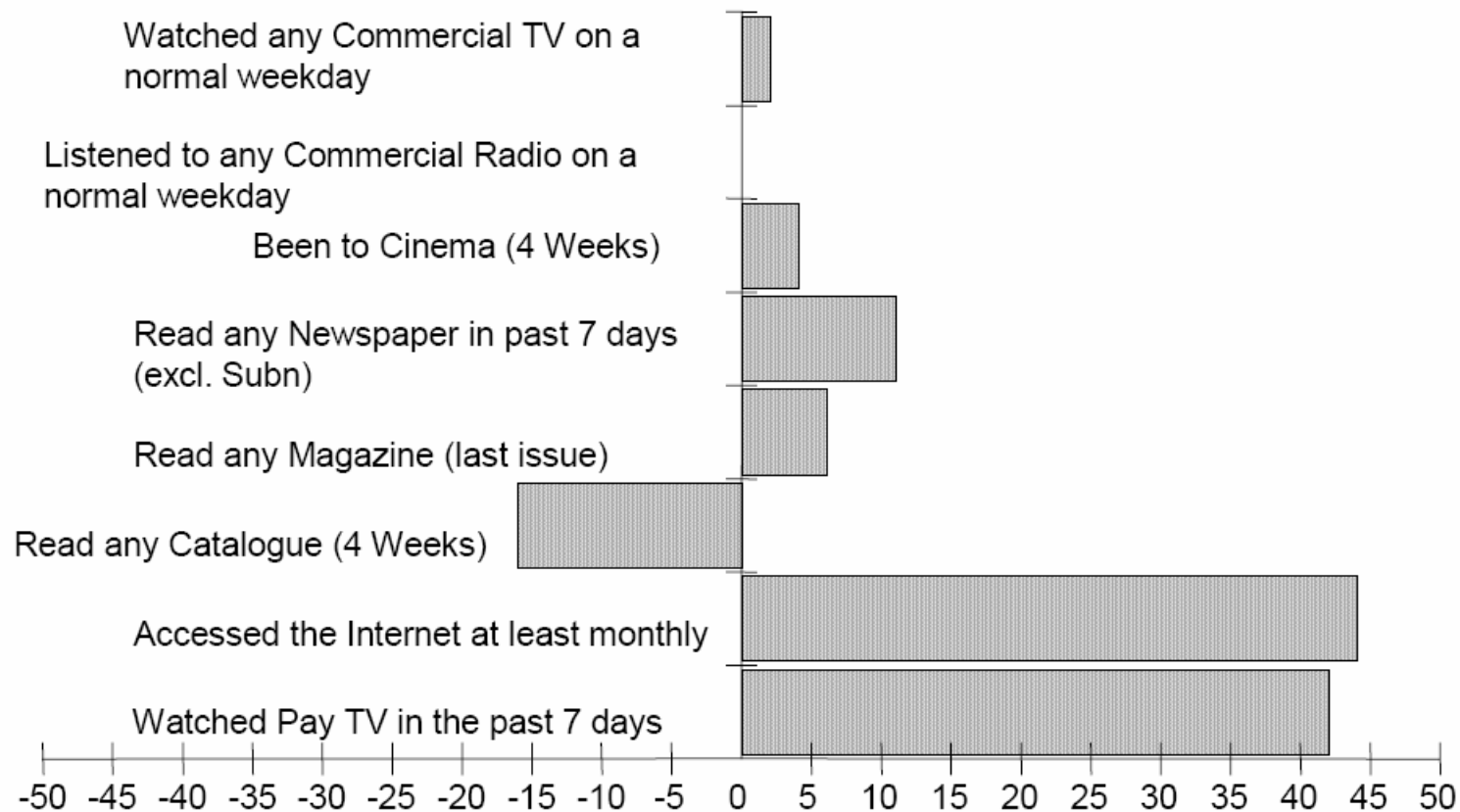
Play “steering wheel”
banner

Results

- Achieved 259% increase in click-throughs (vs. category benchmark)



Index of media performance among Intending Ford buyers in Australia



Source: Roy Morgan Single Source Australia 2000

Spending trends in the US

- From 2003 to 2007, ATL advertising is expected to grow at 5.5% per year while BTL spending is expected to grow at 7.8%

Source: Winterberry Group

Consumer Trends

- Changing consumer demographics
- Growing consumer sophistication
- Widespread clutter diminishes impact of commercial messages that don't address specific and individually relevant consumer needs
- Enhanced information availability empowers both marketers and consumers

- A total of \$354 million was spent on out-of-home advertising in 2005, up 8 per cent on 2004 (Outdoor Media Association)
- Consumption of traditional media is at best stagnating and certainly so on a per capita basis (Simson 2001)

Transformation of Marketing


- One to one marketing
- Interactive Marketing
- Customisation
- Virtual Integration

United Airlines - Netscape


File Edit View Go Communicator Help

Back Forward Reload Home Search Netscape Print Security Shop Stop


Bookmarks Netsite: http://www.ual.com/ What's Related



Worldwide sites | Contact United | Site search



Flight Paging
Our new service automatically notifies you of a change in your flight's status.↗




Fly for America's Team
Save on United ↗

Planning travel
[Create itinerary](#)
[E-Fares \(Sales\)](#)
[Award travel](#)
[Electronic timetable](#)
[Past itineraries](#)
[Request upgrade](#)
[Special offers](#)
[Route maps](#)
[Update profile](#)


Travel support
[Airport services](#)
[Baggage](#)
[Destination info](#)
[Flight status](#)
[In-flight services](#)
[Red Carpet Club](#)
[Service classes](#)
[Special needs](#)
[Wireless/Paging](#)

Mileage Plus
[Mileage summary](#)
[Program info](#)
[Awards](#)
[Promotions](#)
[Partners](#)
[MP programs](#)


About United
[Products and services](#)
[Contact United](#)
[Company information](#)
[Employment](#)
[Alliances](#)
[Our United Commitment](#)
[Worldwide sites](#)
[United - US Airways](#)

**Flight status**
Flight number

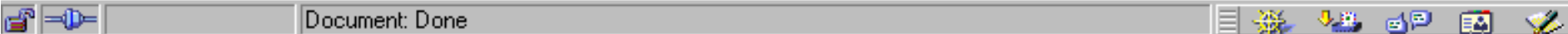
Departure date

**Quick fare finder**
From
 To

Departure date

**Mileage summary**
Mileage Plus#
 Password

Document: Done



Shortcuts | [Complaints](#) | [Feature of the week](#) | [United's record](#) | [About this site](#)

Bullets found on board -- UAL doesn't care!

Untied.com [breaks the report](#) of a former United employee concerning bullets discovered on an aircraft. What did UAL think about the safety implications? Nothing! Plus... other former UAL employees are speaking out: One flight attendant had some [choice words](#) for CEO Glenn Tilton, particularly appropriate now that the airline has [pulled the plug](#) on its employees' pensions. [Gregory Kevakian](#), defying UAL's legal threats, continues to [warn other passengers](#) and [employees](#) about the airline. Other past employees, including [Tim Hafer](#), [Douglas Niven](#), and [David Lawson](#), have provided numerous accounts of UAL's wrongdoing with respect to safety issues, wrongful dismissal, and other retaliatory actions (and won their court battles against the airline). Would you board a plane bearing the "United" logo?

A UALer takes umbrage

Since UAL stock took a nose dive and everyone became aware of corrupt management practices at the airline (reflected most recently by the company [pulling the plug on its pension plan](#)), Untied.com has received almost exclusively supportive comments from the airline's employees. However, every now and then, we receive a gem from someone who still doesn't get it. Here's [such an example](#) from "John".

How UAL Treats its own

A UAL employee alerts the AFA to the [cynical financial manipulations](#) of upper management while they continue to squeeze the regular employees. A former UAL employee "used to hate this site" but had a change of heart after [learning the truth](#) about the airline. Another former UALer describes the [morally bankrupt management practices](#) still going on at the airline, while others comment on the continued [abuse of loyal employees](#). Under such conditions, is it any wonder that passengers receive [similar treatment](#)? Sadly, it seems the only way to deal with this near-bankrupt-but-still-arrogant airline is through the courts, as this poster is [now pursuing legal action](#). Stay tuned!

How UAL Loses its Passengers

Not only have numerous Washington DC hotels apparently decided not to trust UAL, but this [former passenger](#) hasn't even been given the courtesy of a response from the airline to her complaint, now lodged on three separate occasions. In other posts, a [former gold level flier](#) explains why he no longer chooses UAL -- "it's all about service". And another [prospective passenger](#) explains why he'll be choosing another carrier for his flights. It's all here at Untied.com.

If you like our site, please consider [helping support its maintenance](#).

Traveler Section



[Complaints](#)
[Read complaints](#)
[Send a complaint](#)
[Reply received](#)



[Flying UAL](#)
[Safety Concerns](#)
[Performance](#)
[Statistics](#)

Airline Section



[United Airlines](#)
[Who's Who](#)
[Employee Feedback](#)
[Employee Lawsuits](#)



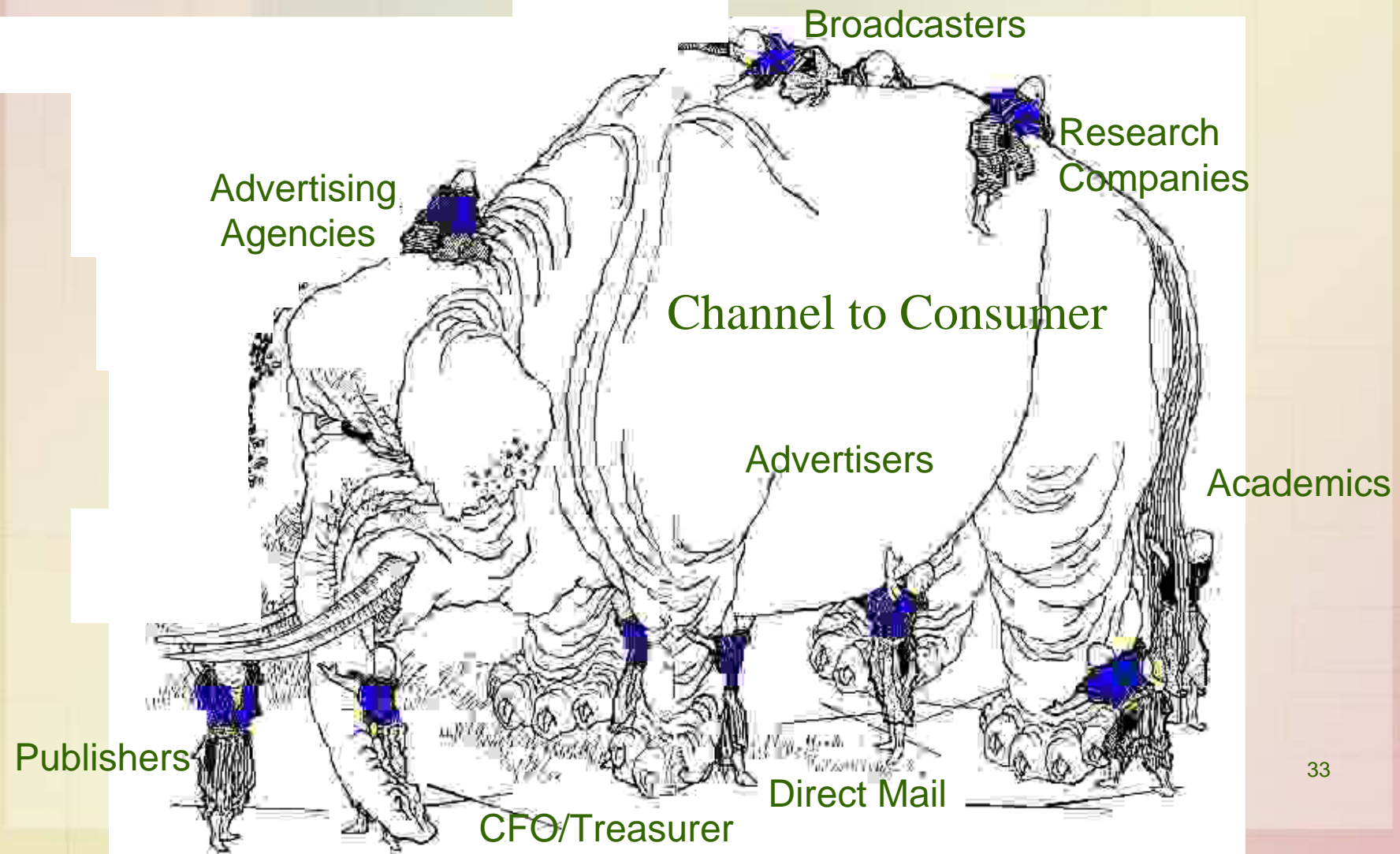
[About Untied](#)
[Untied.com](#)
[history](#)
[Site statistics](#)

- Heightened client pressure to deliver quantifiable value forces greater accountability on marketing service providers

- Perhaps one of the biggest changes is that marketing is becoming less about “pushing” a message and more about trying to engage consumers and give them the opportunity to “pull” their own personal requirements from it. This hinges on indentifying the habits of audiences, how they interact with the new technology and then working out the best way of engaging them.

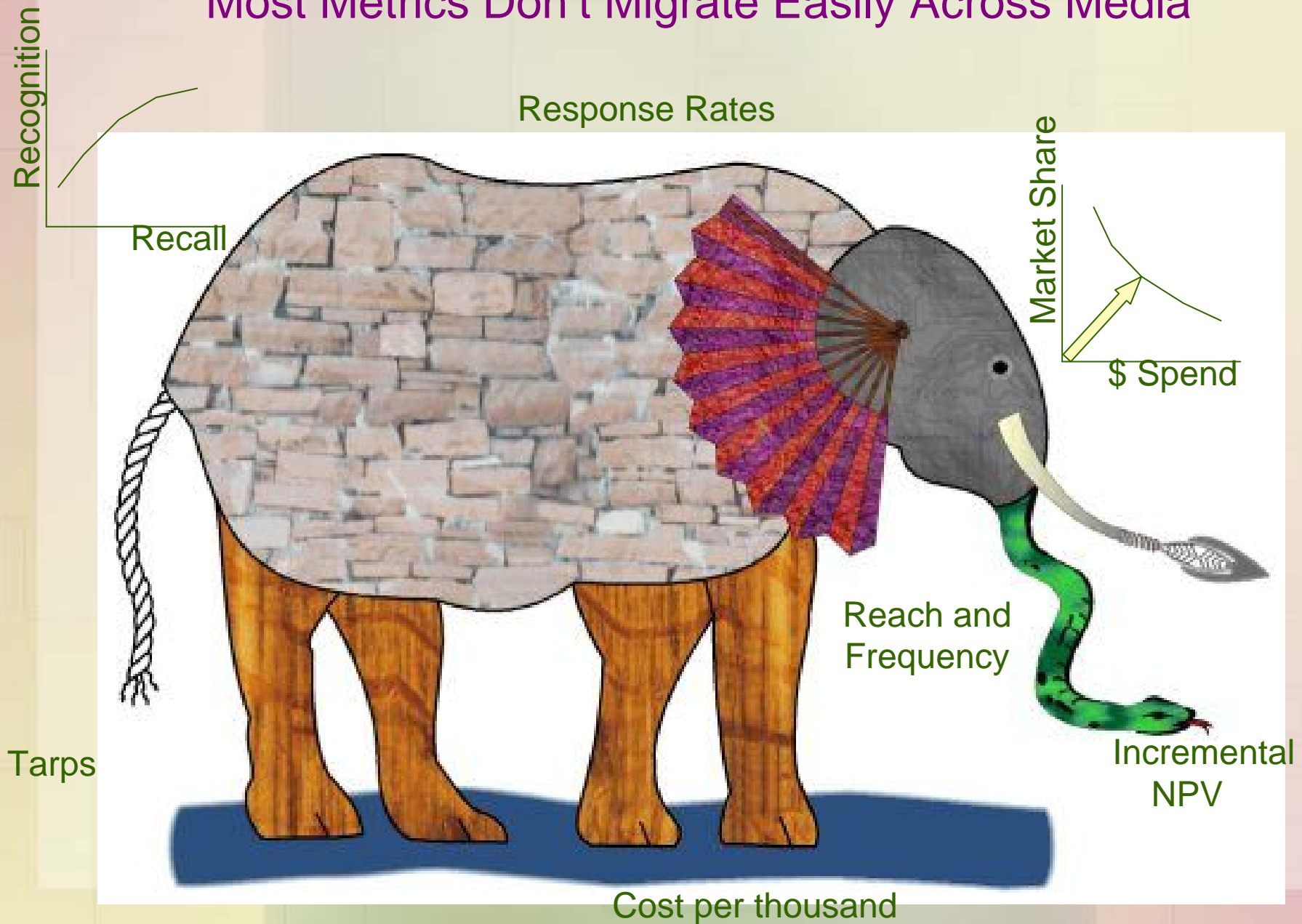
- Monitor Word of Mouth – most influential factor in student recruitment study

Many different stakeholders



The Problem:

Most Metrics Don't Migrate Easily Across Media



“ Weblogs and collaborative filtering make traditional marketing look stupid. Marketing for 100 years or so has consisted of the beaming of messages to demographic segments. Now marketing means me and my web buddies make fun of the messages being beamed to us. I can find out in 0.87 seconds whether Maytag washers are really more reliable. Further, the last person I want to talk to about Maytag washers is Maytag, Inc. because I know they'll just lie to me”

“The era of the destination website is over”

Participation websites will be part of the next stage of the Internet's evolution. Destination websites are in danger of becoming the seaside piers of the information age: vast, beautiful & elaborate constructions, condemned to a brief life.

Leadbeater 2001

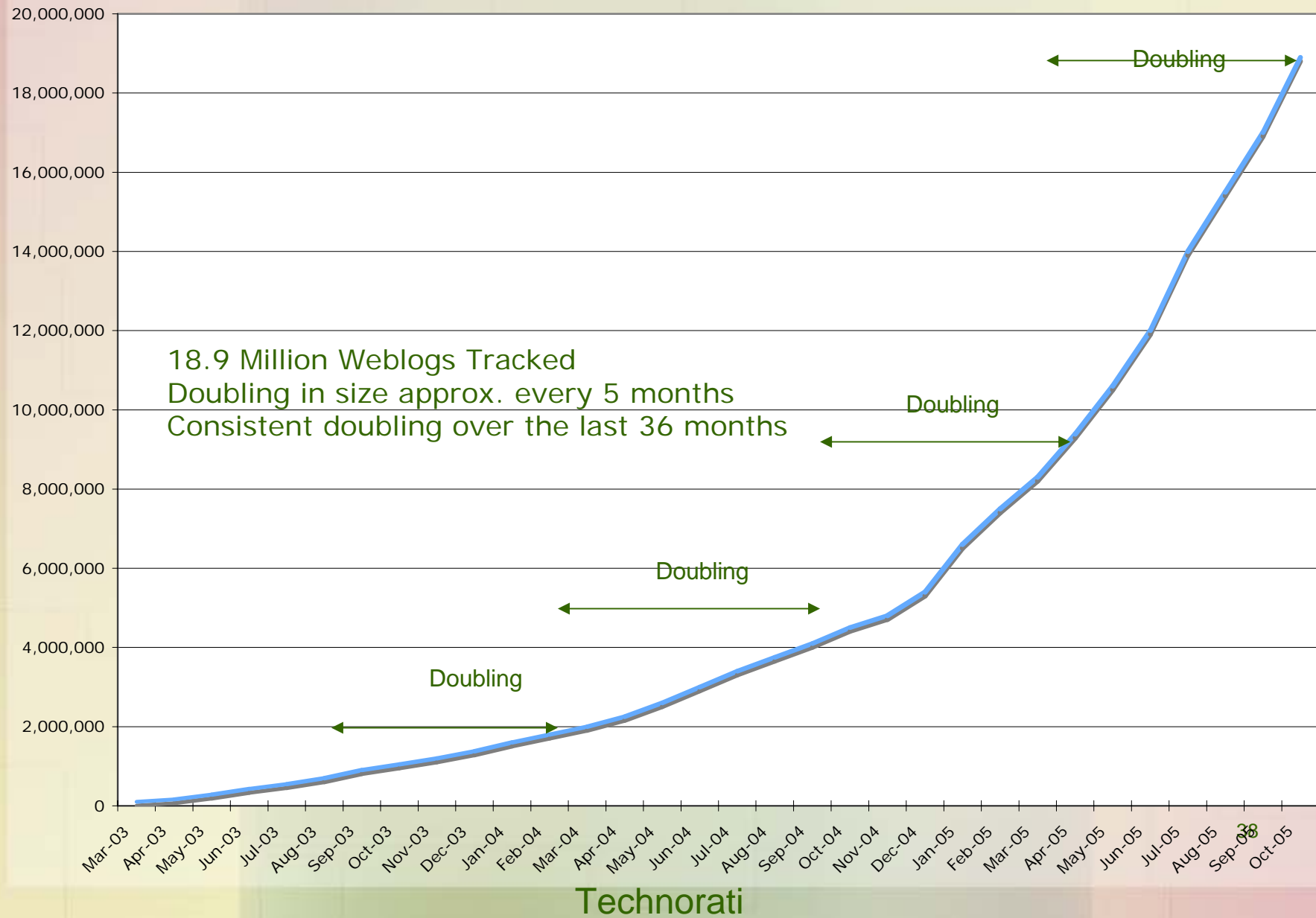
<http://specials.ft.com/creativebusiness/FT3XAQN4RUC.html>

1:1 Relationship

This is what blogging is all about, a one-on-one unmediated relationship between writer and reader paradoxically made possible by the most mass of media, the Internet.

James Wolcott, 2002. "Blog Nation", Business 2.0, May, <http://business2.com/blog>

Weblogs Cumulative March 2003 - June 2005



“ Weblogs and collaborative filtering make traditional marketing look stupid. Marketing for 100 years or so has consisted of the beaming of messages to demographic segments. Now marketing means me and my web buddies make fun of the messages being beamed to us. I can find out in 0.87 seconds whether Maytag washers are really more reliable. Further, the last person I want to talk to about Maytag washers is Maytag, Inc. because I know they'll just lie to me”

“The era of the destination website is over”

Participation websites will be part of the next stage of the Internet's evolution. Destination websites are in danger of becoming the seaside piers of the information age: vast, beautiful & elaborate constructions, condemned to a brief life.

Leadbeater 2001

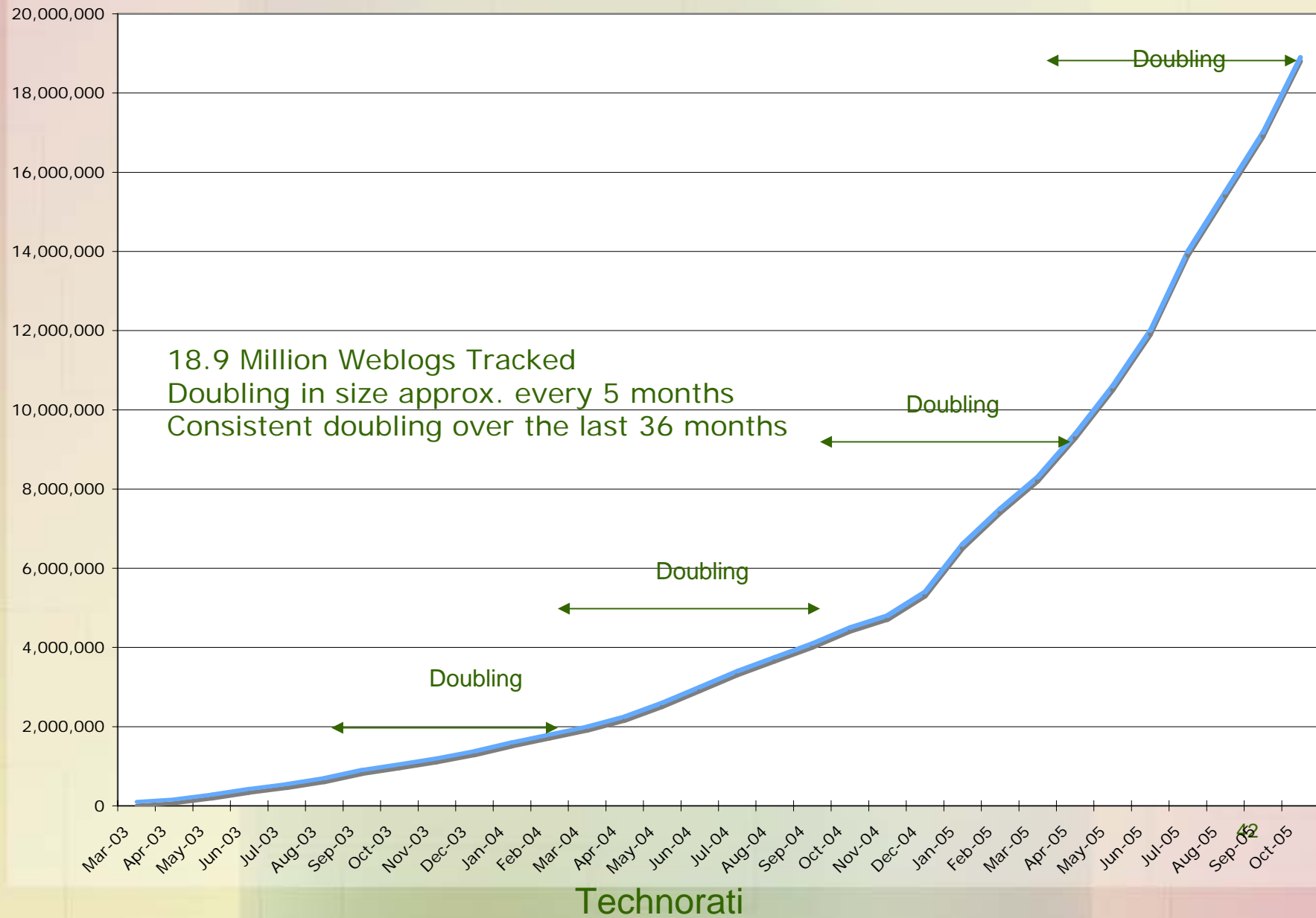
<http://specials.ft.com/creativebusiness/FT3XAQN4RUC.html>

1:1 Relationship

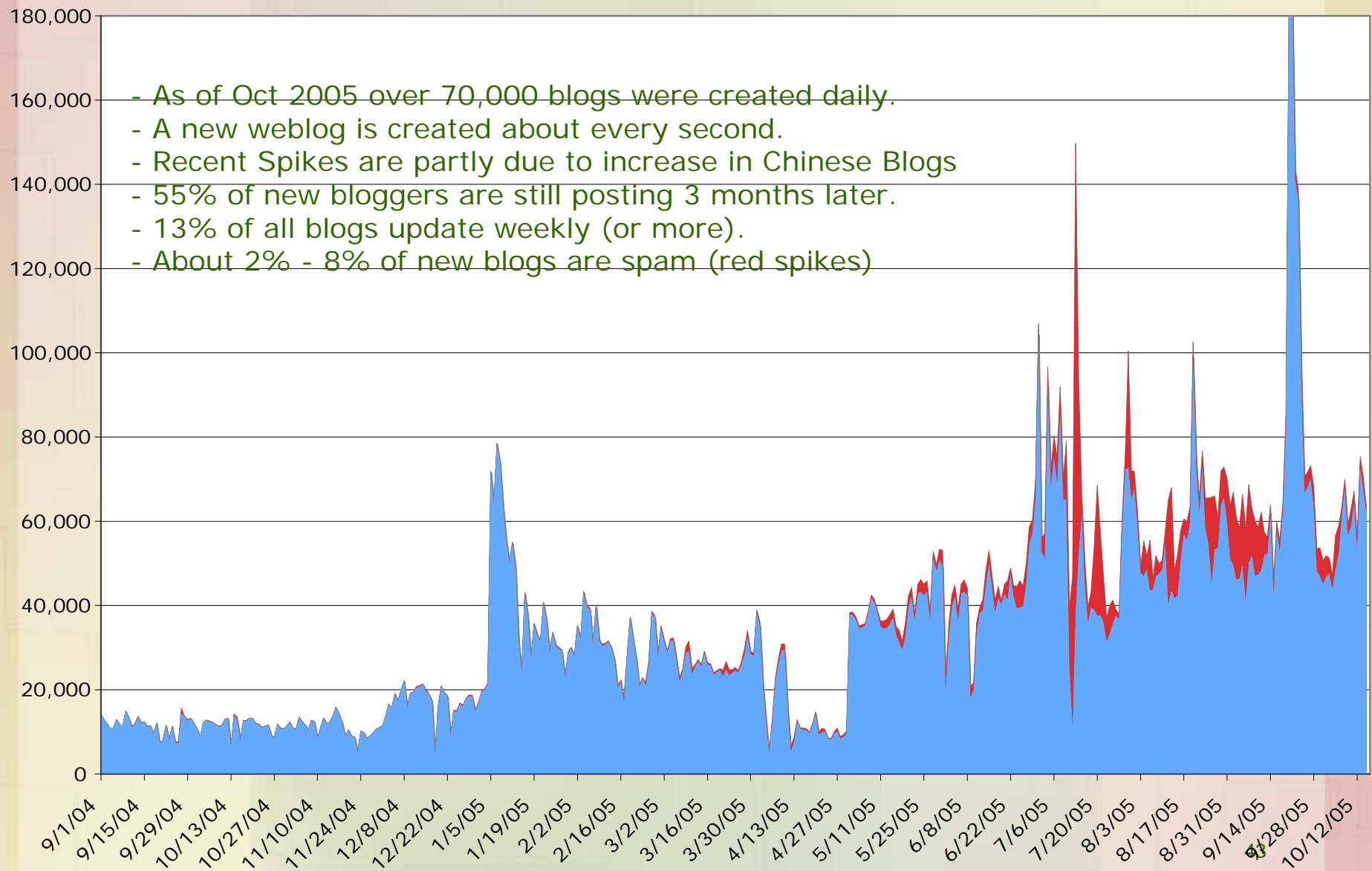
This is what blogging is all about, a one-on-one unmediated relationship between writer and reader paradoxically made possible by the most mass of media, the Internet.

James Wolcott, 2002. "Blog Nation", Business 2.0, May, <http://business2.com/blog>

Weblogs Cumulative March 2003 - June 2005



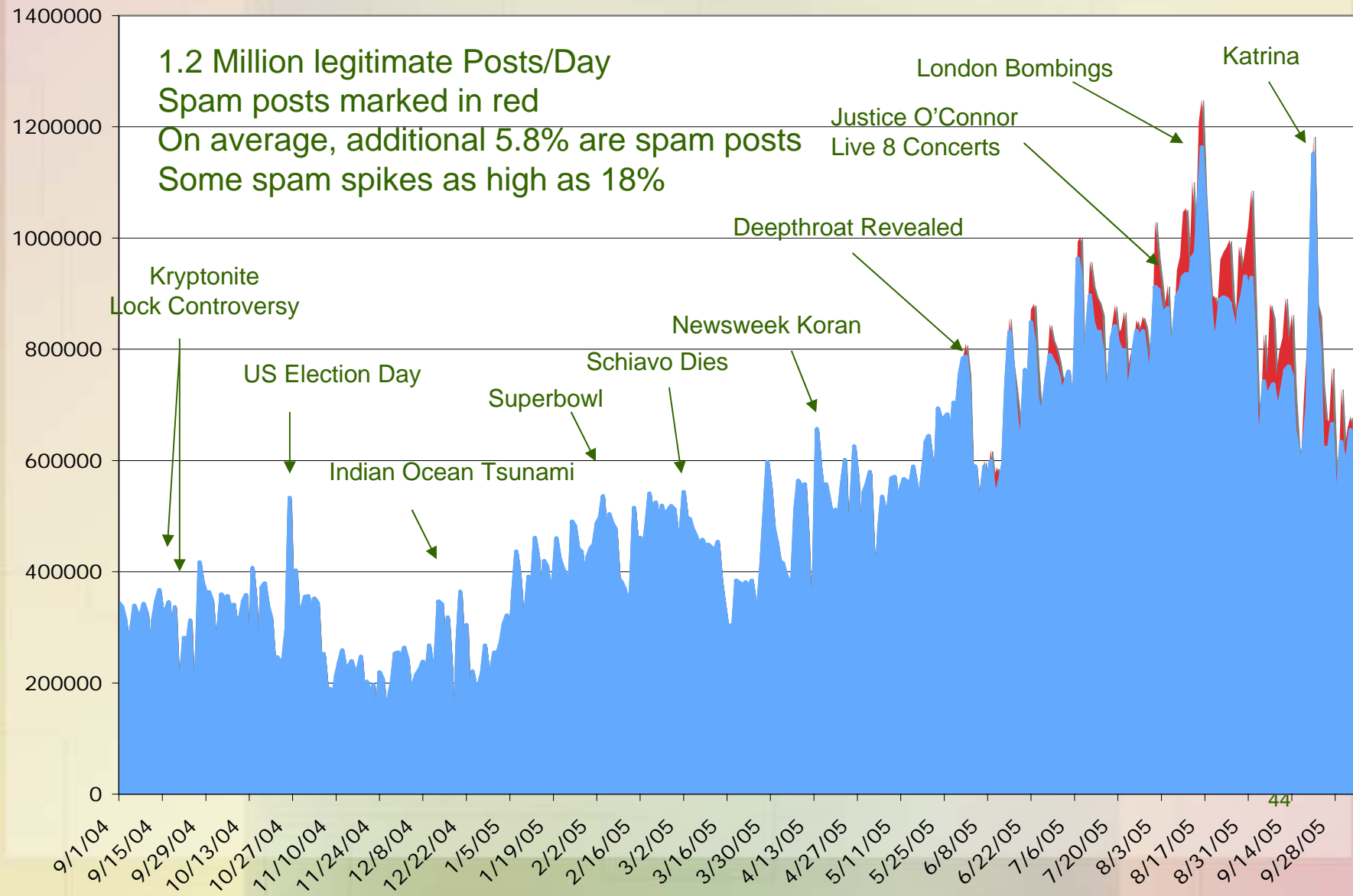
New Blogs per Day



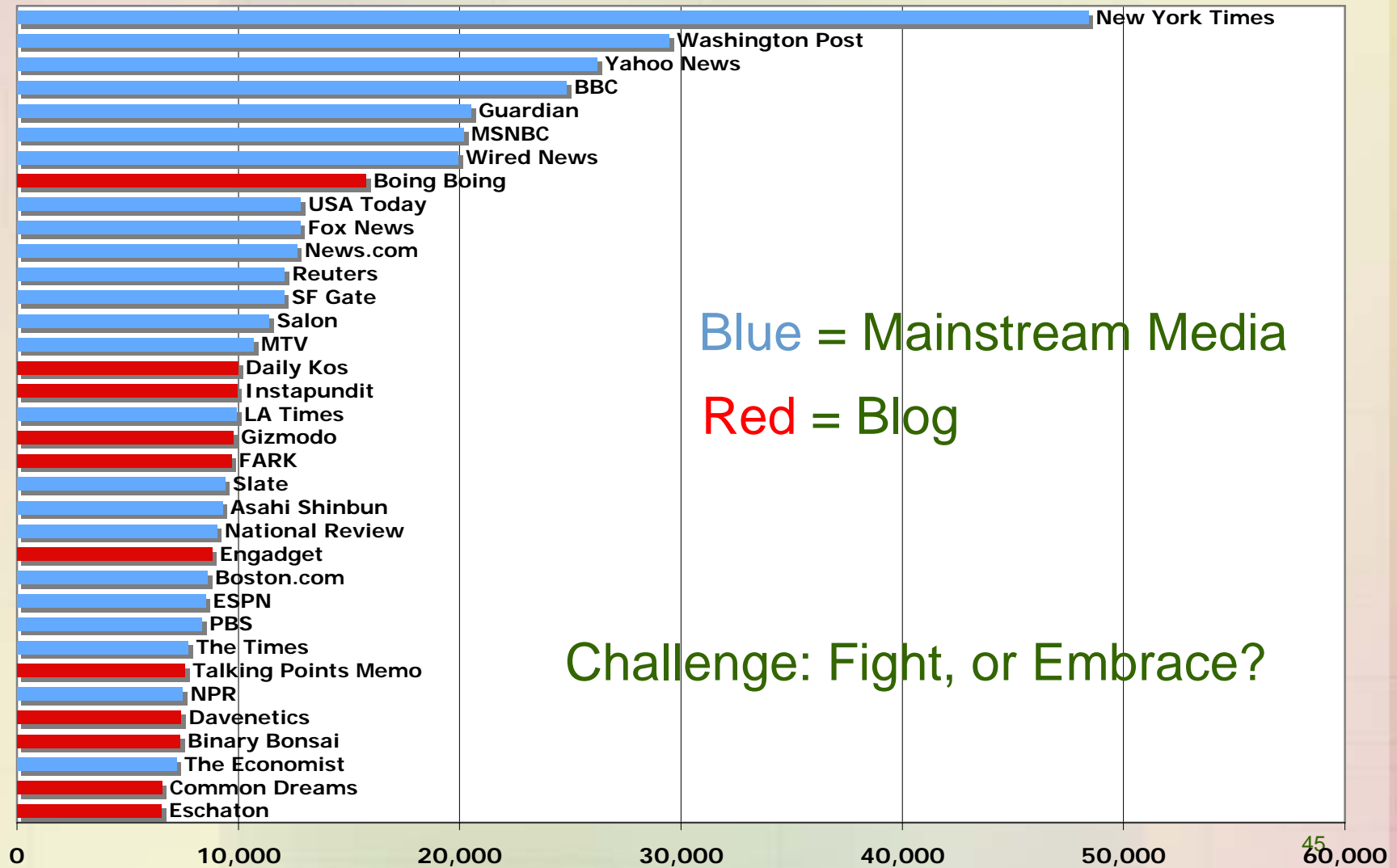
- As of Oct 2005 over 70,000 blogs were created daily.
- A new weblog is created about every second.
- Recent Spikes are partly due to increase in Chinese Blogs
- 55% of new bloggers are still posting 3 months later.
- 13% of all blogs update weekly (or more).
- About 2% - 8% of new blogs are spam (red spikes)

Technorati

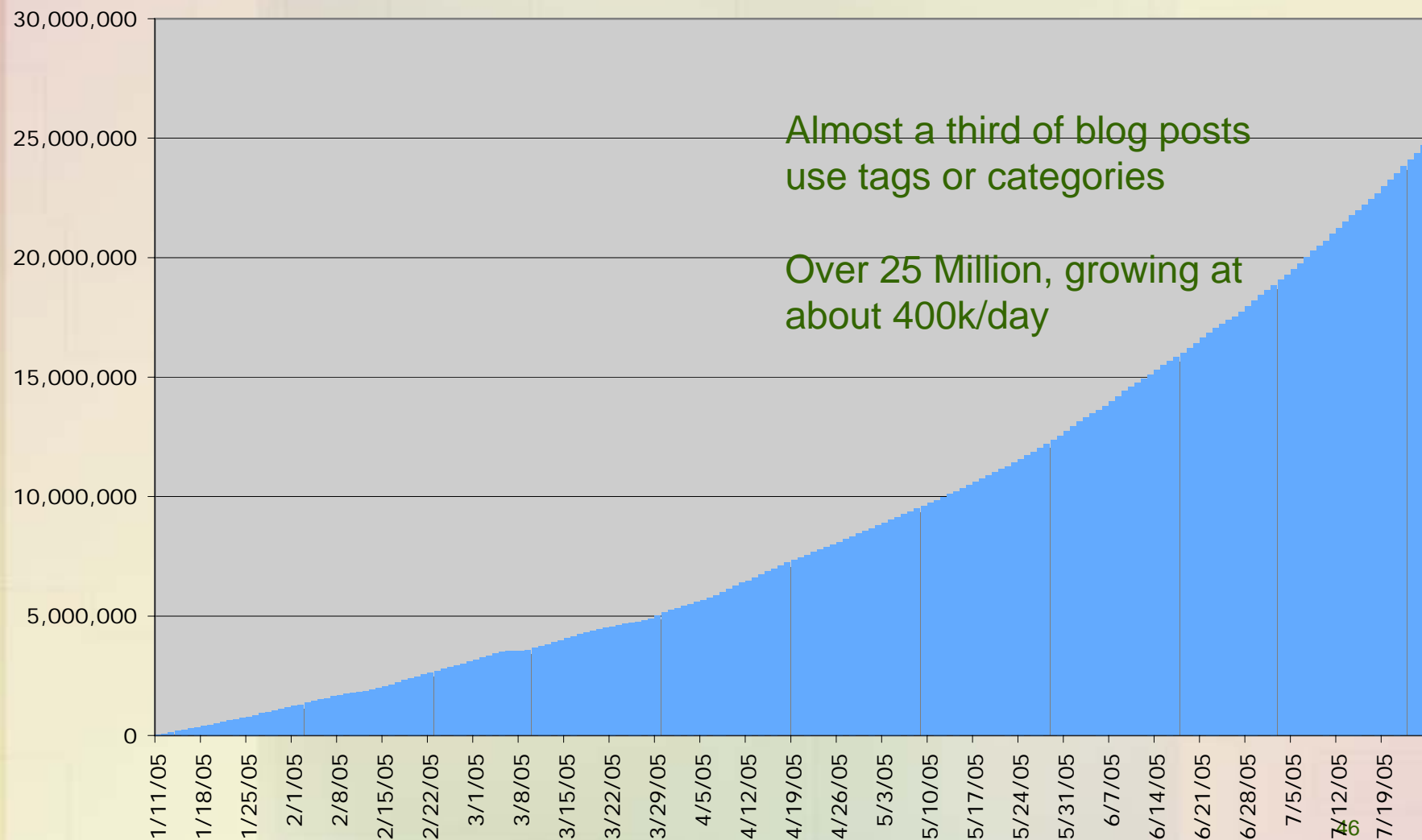
Daily Posting Volume Technorati



Blogs and MSM



Tagged Posts (Cumulative)



Technorati

NOLOGO



fences/windows dispatches contacts FAQs books search:

Urgent Appeal: Release Peace Activists Held in Iraq

Four members of [Christian Peacemaker Teams](#) were taken on November 26, in Baghdad, Iraq. They are not spies, nor do they work in the service of any government. They are people who have dedicated their lives to fighting against war and have clearly and publicly opposed the invasion and occupation of Iraq. They are people of faith, but they are not missionaries. They have deep respect for the Islamic faith and for the right of Iraqis to self-determination.

[Read and sign the appeal for their release...](#)

McDonald's Must Pay Fair for Tomatoes

For months, the Coalition of Immokalee Workers (CIW) have called on McDonald's to do the right thing: Follow Taco Bell's lead and work with the CIW to establish fair wages and

'Never Before!' The Amnesiac Torture Debate

by Naomi Klein > December 8 2005

It was the "Mission Accomplished" of George W. Bush's second term, and an announcement of that magnitude called for a suitably dramatic location. But what was the right backdrop for the infamous "We do not torture" declaration? With characteristic audacity, the Bush team settled on downtown Panama City.

It was certainly bold. An hour and a half's drive from where Bush stood, the US military ran the notorious School of the Americas from 1946 to 1984, a sinister educational institution that, if it had a motto, might have been "We do torture." It is here in Panama, and later, at the school's new location in Fort Benning, Georgia, where the roots of the current torture scandals can be found.

[Click here to read more...](#)

The Threat of Hope in Latin America

by Naomi Klein > November 4 2005

When Manuel Rozental got home one night last month, friends told him two strange men had been asking questions about him. In this close-knit indigenous community in southwestern Colombia ringed by soldiers, right-wing paramilitaries and left-wing guerrillas, strangers asking questions about you is never a good thing.

[Click here to read more...](#)

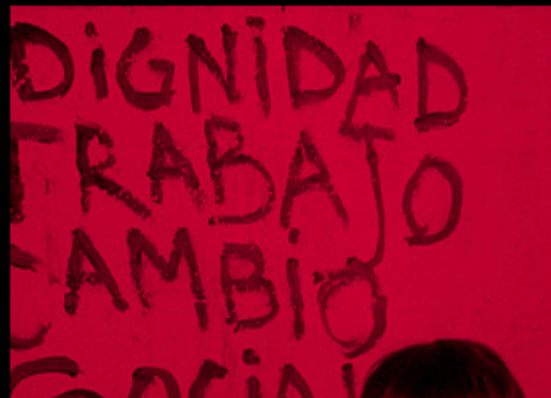
FENCES/WINDOWS

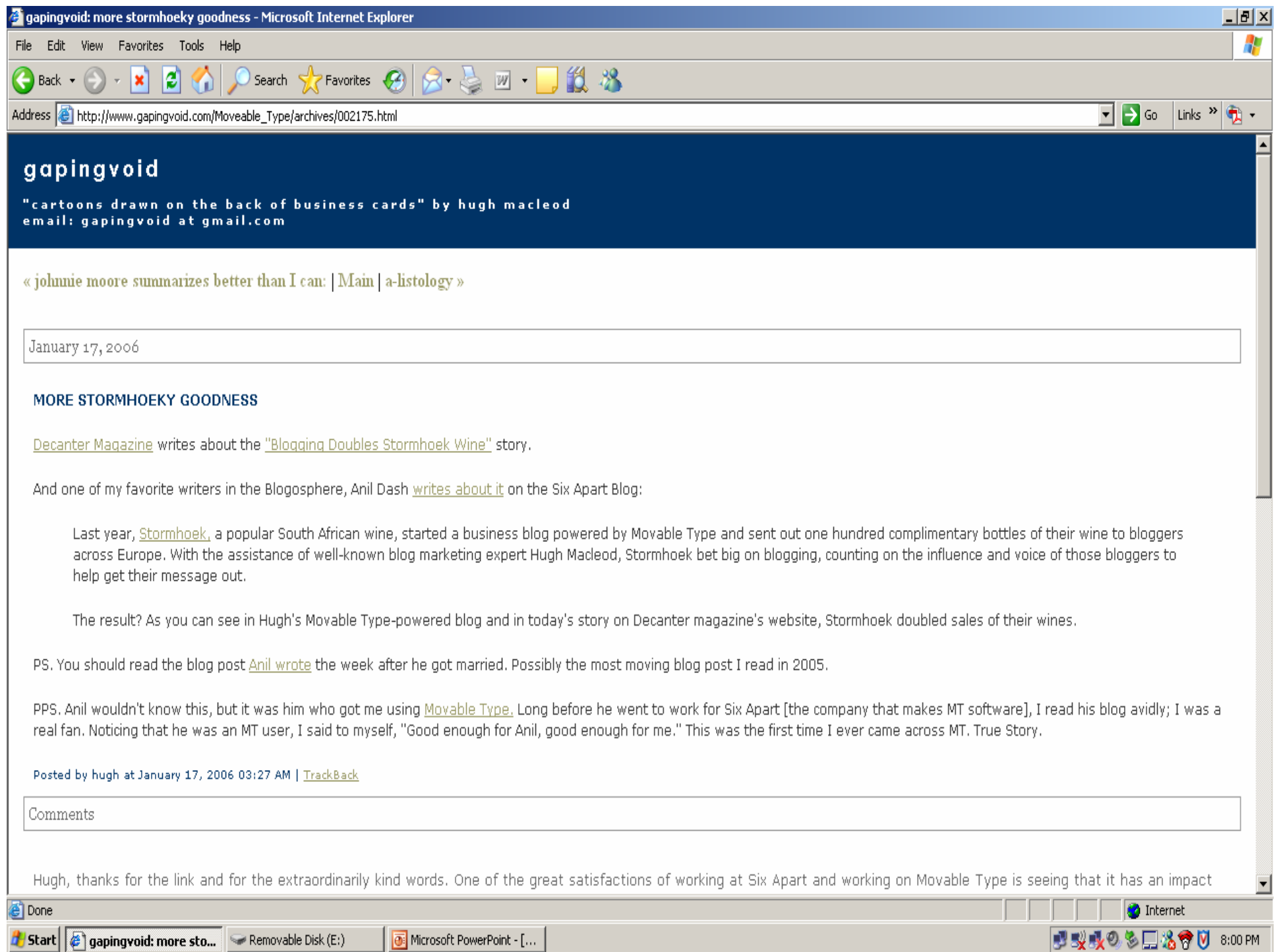
DIGNIDAD
TRABAJO
CAMBIO

DISPATCHES

CONTACTS

FAQS

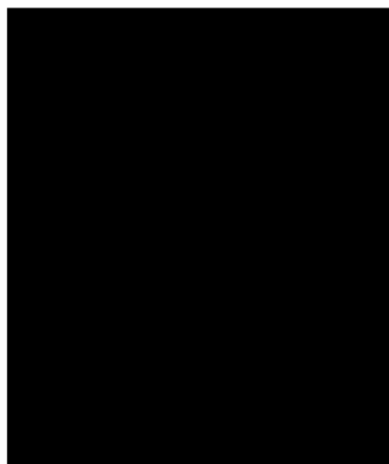






HOME

Monday, February 13, 2006



Who will take tomorrow's front page photograph - a professional press photographer or a passer-by armed with a cameraphone?

Somebody, somewhere is in the position to photograph just about anything that happens on the planet.

If you capture a newsworthy event, you could have a valuable scoop on your hands. Scoop can sell your photos and videos to the media - and you'll get paid just like a professional.

Enter your email to join the monthly mailing list:

Scoop is simple. Scoop is free. **Join Scoop today** and snap...send...sell!

[Picture editors](#) | [Terms and conditions](#) | [Site by inPreparation.com](#)

Intelliseek's BlogPulse - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Reload Print Mail Blog

Address http://www.blogpulse.com/ Go Links

blogpulse™

a service of Intelliseek

ANALYSIS TOOLS SEARCH SHOWCASE ABOUT

TOP BLOG POSTS → RSS Feed

- 1 Yarn Harlot: The 2006 Knitting Olym...
- 2 Achieve-IT!: How to Take A Caffeine...
- 3 Rantings of a Sandmonkey: Boycott E...
- 4 news: Corniest Feature EVAR
- 5 http://www.huffingtonpost.com/al-fr...

TOP BLOGS → RSS Feed

- 1 BoingBoing
- 2 TheHuffingtonPost|RawFeed
- 3 Lifehacker
- 4 Engadget
- 5 MichelleMalkin

TOP NEWS STORIES → RSS Feed


- 1 CNN.com - Cheney accidentally shoot...
- 2 Telegraph | News | US prepares mili...
- 3 http://www.nytimes.com/2006/02/12/o...
- 4 http://www.nytimes.com/2006/02/12/p...
- 5 globeandmail.com : Better living th...

Search the blogosphere:

[Advanced] [Help]

Enter keyword(s) or URL


Take the BlogPulse Tools for a spin:



Trend Search

Create your own graphs plotting blog buzz for search terms!


[Go >](#)



Featured Trends

We did the trend search work for you! Check out popular items!


[Go >](#)



Conversation Tracker

Follow the trail of a story between bloggers!

[Go >](#)



BlogPulse Profiles

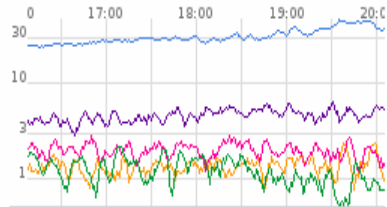
(Beta) Get a deeper view of your favorite sites and authors.


[Go >](#)

BLOGPULSE LIVE

February 13, 2006 20:07

% of Posts by Topic (ET)





©2006 BlogPulse 

BLOGPULSE STATS


WHAT IS BLOGPULSE?

BlogPulse is a window into the blogosphere... open it daily to discover the people, issues, blogs, posts, commentaries, tidbits and news that bloggers are discussing. [Read more >](#)

 [General Overview](#)

 [Focus on Technology](#)

Catch the latest buzz in Our Blogs:



BlogPulse™ Newswire → RSS Feed

A BlogPulse blog summarizing recent activity, trends, personalities and issues in the blog universe. Most recent posts:

February 13, 2006 [Straight Stuff: Straight Talking, Not-So-Straight Shooting, Straight from the Heart](#)

Done

Start Intelliseek | Monitor, Me... Intelliseek's BlogPuls... Removable Disk (E:) Microsoft PowerPoint - [...]

Internet 8:07 PM

Technorati: Home - Microsoft Internet Explorer

File Edit View Favorites Tools Help


Back Forward Stop Home Search Favorites RSS Print Mail W Address http://www.technorati.com/ Go Links

Currently tracking 27.8 million sites and 2 billion links. [Member Sign In](#) [Sign Up](#) [Help](#) [About](#)

Technorati™ Search Tags Blog Finder Explore

In the News: The thrill of victory and the agony of defeat in the [Winter Olympics](#). »

Search 27.8 million blogs for the latest on: Options



SEARCH

Top Searches

- Cheney
- "Dick Cheney"
- "Mohammed Cartoon"
- Alicia Machado
- Olympic
- [More in Search »](#)

Hot Tags

- Dick Cheney
- Bush
- Cheney
- Government
- Islam
- [More in Tags »](#)

Featured Blog [Add Yours!](#)

Turkey & My Foreign Perspect...

Tagged Business, Cultural differ..., Culture, Current Affairs, Every day life, Turkey, Turkish Culture...

[More in Blog Finder »](#)

Sponsored link: [Printing From Your Files](#) PrintingForLess.com has made custom printing easy! [Your Ad Here](#)

NEW

Politics	Gadgets	Advertising	Tech	Internet
<ul style="list-style-type: none"> On The Hunt: Media Feeding Fre... Al Gore Slanders America \$1.6 Billion. 	<ul style="list-style-type: none"> Rumor: Ipods With Bluetooth An... Ipod Con Pantalla Táctil The Msn Tv Linux Cluster 	<ul style="list-style-type: none"> New News* The Ka Boys Blogging And The Elusive Mass ... 	<ul style="list-style-type: none"> Start The Discussion » Dance, Let's Dance! Barbie, Da... Icool Smelly Mp3 Player 	<ul style="list-style-type: none"> Gmailと連携した google Talkのクイックコンタ... Using Open-source To Get Limew... Qumana Beta 3.0

(3 items remaining) Downloading picture http://static.technorati.com/pix/home/fromtechnorati.gif...

Start Intelliseek || Monitor, Me... Technorati: Home - M... Removable Disk (E:) Microsoft PowerPoint - [...]

Internet 8:08 PM

Analyzing Brand Weblogs

- The stories reported on a weblogs represent the **voice of the consumer** rather than that of the advertiser or brand manager

- Researching the stories on weblogs is useful for advertising executives.
 - It helps clarify and deepen the knowledge of how people resolve paradoxes triggered in their minds by a conscious feeling of unease, awareness of a problem or opportunity arising from conflict.

The implications

- Advertising executives who intend to analyse brand stories on weblogs, should consider the following points:
 - Crafting a story, whereby the brand is a supporting actor enabling the protagonist to achieve conscious and/or unconscious goals which are likely to reflect very favourable consumer-brand relationships.

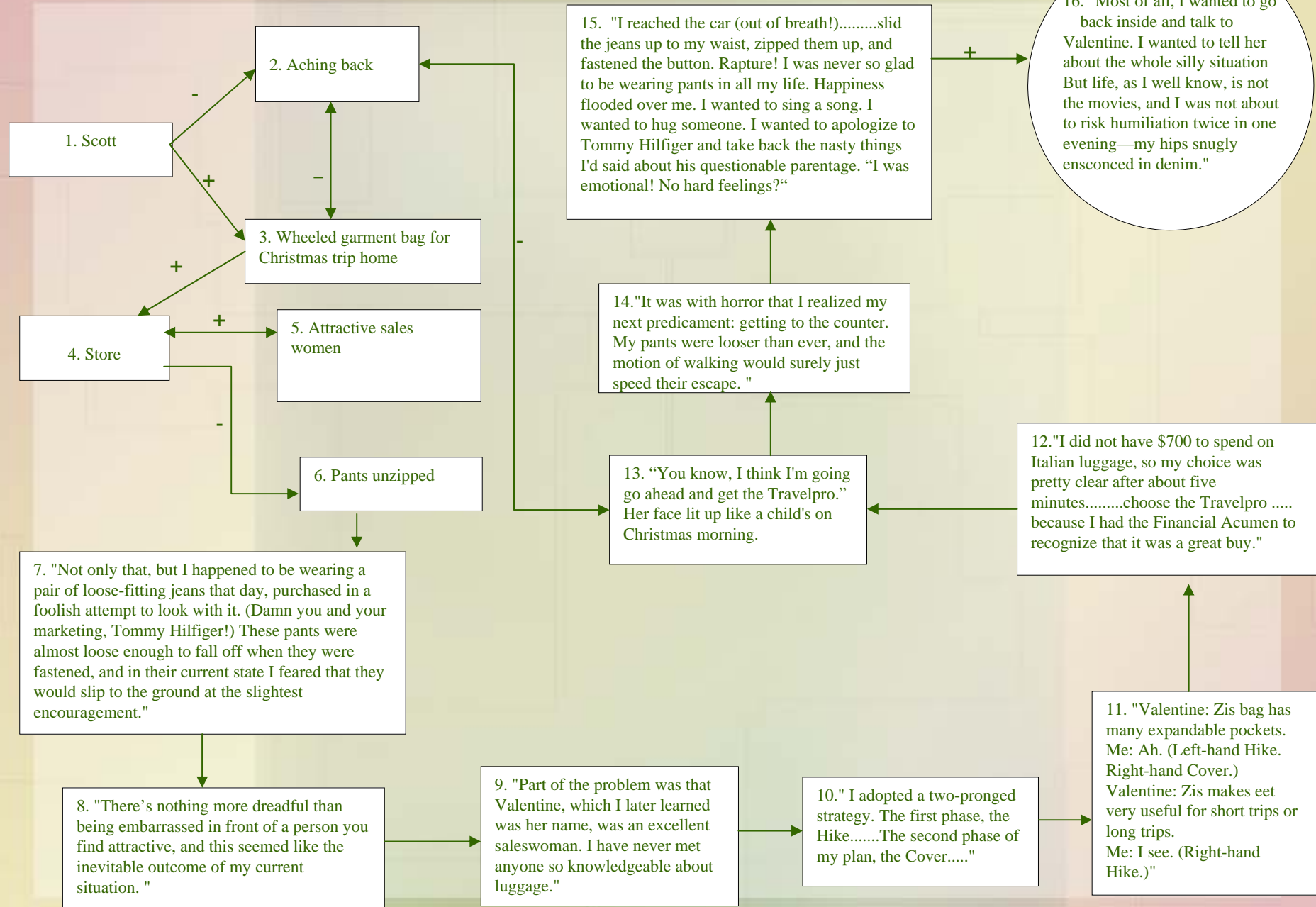
The implications

- The storytelling analysis includes self-oriented thinking by the storyteller with near-conversational interactions with the primary brands appearing in the stories.

The implications

- Learning about what buyers and users say to the brand and what the brand says first and back in such conversations is likely to provide valuable clues for designing highly effective advertising strategies.

Elaboration of Unzipped - Tommy Hilfiger Jean Wearer Communication



Source: Sood and Miller