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Abstract

The Internet brought with itself a change in the paradigm for spreading messages and the ability to interact with audiences. Conventional media and commercial communication are notably unidirectional with quite limited opportunities for the audience to respond. Internet users answer and try to participate in message configuration.

Besides, traditional advertising media are very fragmented and cluttered and brands need an online presence. Usage figures show a global growth trend. The so-called digital divide is narrowing. Today the majority of users are not living in the U.S. and Canada. Europe and Asia/Pacific account for 62.4% of online users in the world. Besides, Internet’s development is remarkable elsewhere: in less than two years it has also doubled in Latin America, Africa and the Middle East. In seven European countries, more than 50% of the population is online. The U.S. is just the fifth world country in terms of user percentage: the Net does not seem to be just another American export.

As the medium becomes mainstream, serious Internet branding will be unavoidable for advertisers. It seems that Internet branding will need to be integrated, consumer-focused, outside-in in its approach to audiences. The advertising recession seems to be coming to an end, and the Internet might be one of the media that will benefit the most in an environment of explosive global audience growth, with Europe leading the pack.

1. Internet growth

The growth of the Internet is remarkable. In November 2000, U.S. & Canada accounted for 41% of the Internet population worldwide, with Europe behind at 27.8% (Table 1). The so-called digital divide was more apparent back then.

As of September 2002, Internet usage figures show a universal and quick growth trend (Table 2). There are more Internet users in Europe, Asia and the Pacific than in the U.S. and Canada. Besides, Internet’s development is remarkable elsewhere. In less than two years it has doubled in Africa, the Middle East and Latin America, where a country like Chile has already more than 20% of its population online. The Internet population has gained 198.5 million worldwide. Europe deserves attention: in the past year alone, 12.7 million new users have signed on in Europe’s five largest nations — Britain, France, Germany, Italy and Spain. That brings those countries’ active Net population —

1 ITU.
those who log at least once a month— to 60 million, up 14% in just the past six months. By comparison, active users in the U.S. have held flat, at 105 million, over the same period\textsuperscript{2}.

**TABLE 1.**

| Internet users in selected world areas and percentage over total users (November 2000) |
|---|---|---|
| U.S. & Canada | 167.12 million | 41% |
| Europe | 113.14 million | 27.8% |
| Asia/Pacific | 104.88 million | 25.8% |
| Latin America | 16.45 million | 4% |
| Africa | 3.11 million | 0.8% |
| Middle East | 2.40 million | 0.6% |
| **World Total** | **407.1 million** | **100** |

Source: NUA Internet Surveys, www.nua.net

**TABLE 2.**

| Internet users in selected world areas and percentage over total users (November 2002) |
|---|---|---|
| Europe | 190.91 million | 31.5% |
| Asia/Pacific | 187.24 million | 30.9% |
| U.S. & Canada | 182.24 million | 30.2% |
| Latin America | 33.35 million | 5.5% |
| Africa | 6.31 million | 1% |
| Middle East | 5.12 million | 0.9% |
| **World Total** | **605.2 million** | **100** |

Source: NUA Internet Surveys, www.nua.net

\textsuperscript{2} "E-commerce is starting to click", Business Week, August 26, 2002.
As Table 3 indicates, among the countries where Internet users account for more than 50% of the population, seven are European countries (the top three among them) and six are from the Asia-Pacific Rim. The Internet does not seem to be just another American export. As a matter of fact, the United States ranks fifth in the world in percentage of Internet users among the overall population.

**TABLE 3.**
**Countries with higher percentage of Internet users**

<table>
<thead>
<tr>
<th>Country</th>
<th>% of Population using the Internet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sweden</td>
<td>67.8</td>
</tr>
<tr>
<td>Denmark</td>
<td>62.7</td>
</tr>
<tr>
<td>The Netherlands</td>
<td>60.8</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>59.5</td>
</tr>
<tr>
<td>Norway</td>
<td>59.2</td>
</tr>
<tr>
<td>United States</td>
<td>59.1</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>57.2</td>
</tr>
<tr>
<td>Australia</td>
<td>54.5</td>
</tr>
<tr>
<td>South Korea</td>
<td>53.8</td>
</tr>
<tr>
<td>Canada</td>
<td>52.7</td>
</tr>
<tr>
<td>Switzerland</td>
<td>52.7</td>
</tr>
<tr>
<td>New Zealand</td>
<td>52.7</td>
</tr>
<tr>
<td>Finland</td>
<td>51.8</td>
</tr>
<tr>
<td>Singapore</td>
<td>51.8</td>
</tr>
<tr>
<td>Taiwan</td>
<td>51.8</td>
</tr>
</tbody>
</table>

In Europe there are nineteen countries with more than 20% of the population online: Austria, Belgium, Denmark, Czech Republic, Estonia, Finland, France, Germany, Ireland, Italy, Luxembourg, Malta, The Netherlands, Norway, Portugal, Slovenia, Sweden, Switzerland and the United Kingdom. In the Pacific Rim there are nine: Australia, Hong Kong, Malaysia, Japan, Macau, New Zealand, Singapore, South Korea and Taiwan. The increasing number of countries where Internet approaches figures similar to those of traditional media such as dailies, radio, magazines and television should not be ignored by advertisers.

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3 See http://www.nua.ie/surveys/how_many_online. How many online?, September 2002. The data come from different sources but for the above mentioned countries most of the figures are from Nielsen NetRatings and ITU.
2. Changes in the advertising environment

The worst of the advertising recession seems to be coming to an end. Global Insights forecast gains for all major media, but predicted cable TV, radio and the Internet will benefit the most, while newspapers and broadcast TV face loss of market share to other media. Still, things are not likely to be the same for traditional media, with some major advertisers leading the way. GM, for example, says traditional media’s share of its marketing budget has fallen to about 60% today from up to 75% five years ago. Needless to say, Internet is one of the new players. In the new order of marketing, traditional media advertising will play a smaller role.

3. An exaggerated crisis?

Even though many things have been written about the Internet crisis and the “bubble bust”, the growth of the Net has remained strong both in commerce and number of users. An Advertising Age report found out that “revenue at the top 100 interactive agencies fell by nearly a third last year, but they still generated an impressive $2.1 billion in marketing-services business. It’s tangible sign that Net business is real business. Since the Internet stock bubble burst on the spring of 2000, the number of U.S. consumers who actively use the web at home has grown: up 31% (to 105.2 million) from April 2000 to April 2002. More than ever, they use the Internet for commerce, for communication, for information.”

There was an economic downturn, but the media and business world were already affected by Internet’s influence. In spite of September 11, Internet traffic is showing staying power. Many sites continue to see traffic figures that are more than double pre-attack levels.

Golson (2001) had already written about this, just after the September 11 attacks to the U.S. His explanation is worth to be recalled. Internet traffic had quadrupled in the past 12 months. Personal use of the Internet continued to climb. In the US people spent 20% more time online this year than they did in 2000. E-commerce had increased 30% since the Nasdaq slump began. Those who say they consider the Internet to be more essential than a TV set, already a majority, have continued to grow in numbers. As users adopt high-speed connections, time spent online doubles. Studies now emerge that show much-caricatured Internet users to be, compared with the average, smarter, healthier (that depression study was debunked) more physically active. Admittedly, diversity and access for the poor are still challenges.

4. From mass communication to consumer focus

The planning judgment is a now a judgment on Integrated Marketing Communications (Kliatchko, 2002). Advertising message environments and their contents are un-

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6 Cardona, Mercedes M. "Big guns predict smaller ad role", Advertising Age, July 1, 2002, 1, 19.
drgoing a transformation period. New information and entertainment technologies are expanding rapidly. The expansion is not likely to slow down.

These technologies do not necessarily lead to better media quality, but most new developments are based on an eagerness to distance media from mass parameters. Audiences are addressed in ways that are more similar to interpersonal dialogue. Far from simply persuading, they want to convince. Instead of orders, they provide arguments. Beyond imparting information, they aspire to communicate. In the final analysis, they want to change the classic broadcaster-message-receiver model. In the so-called “mass communication” framework, a highly deterministic approach was desired in order to control “masses”. These “masses” would have easily predictable behaviors and thus they would be relatively easy to control.

From this transmission paradigm, a participation paradigm seems to be under way. The new framework is based on what could be defined as postmodern dialogue with audiences, a way to communicate typical online. Communication brings with it dialogue, mutual understanding and mutual dependence (Grunig: 1992). A bidirectional and symmetrical dialogue takes into consideration the audiences’ initiative. In the wider field of marketing it seems to be a growing consensus. Exchange has been considered crucial for marketing studies already for some time (Bagozzi: 1975). Exchange and dialogue are now paramount. Instead of sheer communication effectiveness within supposedly mass communication media, communication excellence is sought.

In a world where competition for leisure time and audience interests has increased exponentially, the very notion of mass communication is something new into question. Judging media just by the old system seems to be obsolete. In the new digital, consumer centered paradigm, The decision is largely a decision on integrated communications, which takes into account the different variables of marketing and the plethora of communication tools at the disposal of persons, brands, firms, and institutions.

The skills needed for a thorough knowledge of media and consumer markets are thus related to creative problem solving. As Morrison (2000: 13) puts it, “a creative problem solver is defined as a solutions-oriented strategist who is able to turn data into ideas”, not a mere software manipulator. Moreover, non traditional media have allowed to break “conventions of medium” (Morgan, 1999: 94-97). People expect product categories to express themselves in particular kinds of media: the real breakthrough may not be the strategic idea or the creative thought, but the choice of a different medium or set of media as an expression of creativity and strategy. The power of communication to the consumer might come in the interaction between innovative message and unconventional medium.

The need for change and renewal seems to be apparent. The traditional media planning course is reshaped to “add focus on the consumer (…) focusing on audience analysis rather” (Scott, 2001: 7). A framework for selection and evaluation, consumer centered in approach, is needed to overcome the inherent weaknesses of one-way, top-down traditional media measures, based on the sender, not the receiver. Internet branding needs to be focused on the consumer. Therefore, communication should be thought of outside-in and not inside-out.
Tilley (2000: 195-196) proposes a similar approach: “As a result of the dramatic expansion of media choice, the consumer-media relationship—the way in which consumers choose and use the media and their attitudes to it—has also changed (...) the portfolio of media that an individual experiences—their ‘Personal Media Network’—is far greater (...). At the same time, the time available to actively consume media, whether that is reading, listening to radio, or watching TV, has fallen (...). As a result, consumers, now armed with an increasing array of technology and information, actively edit their own media environment”. Internet is a powerful force in this environment.

Some brands have understood consumer focus better than others. IBM applies “marketing principles, and message that clicks with audience”9. “Cohort management” or the idea of bundling many brands into online marketing effort aimed at a common consumer group, not only survived dot-com doom but is producing surprising results to large package good marketers that use the Net as a tool for “experiential marketing” (candystand.com, Kraft; homemadesimple, P&G; verybestbaking.com, Nestle USA; marsbrightideas, Masterfoods)10.

Brands have to think about their online presence in ways that are not conventional. Marketers will build brands online, but not necessarily with ads (Khermouch, 2003): “many have come to recognize that the beauty of the Internet is that it can put lots of information and how to buy them in reach of any potential customer (...) That makes the Internet a powerful marketing tool, but not when it is used to carry pop-ups and banners. Instead, marketers are using traditional techniques like packaging, promotions and print ads to steer consumers to company web sites packed with product information, entertainment and branding messages”.

The key seems to be increase and deepen relationships with customers: “the company can forge direct relationships with those who visit to gather recipes and participate in promotions. At the same time, it can build a database of its best consumers whose loyalty it can cement with more targeted efforts like coupons and direct mail offers” (Khermouch, 2003).

Bibliography
KLIATCHKO, J., Understanding Integrated Marketing Communications, University of Asia and the Pacific, Pasig City (Philippines) 2002.

9 “Staying basic”, Advertising Age, October 8, 2001.
10 Advertising Age, April 8, 2002.


