

# TOWARDS NEW MEDIA PARADIGMS

CONTENT, PRODUCERS,  
ORGANISATIONS AND AUDIENCES

II COST A20  
INTERNATIONAL CONFERENCE PROCEEDINGS  
PAMPLONA (SPAIN), 27-28 JUNE 2003

RAMÓN SALAVERRÍA & CHARO SÁDABA  
(Editors)



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ISBN: 84-7768-150-3

Depósito Legal: NA-561/2004

Imprime: Garrasi. Avd. Barañáin, 52. Pamplona

Printed in Spain-Impreso en España

## Summary

Foreword.....	11
Editors' Note.....	15

### PART I CONTENT

<b>Directions in Motion. On Creation and Production of Interactive Scripts</b> .....	19
Jordi Alberich Pascual (Universitat Oberta de Catalunya) (Spain)	
<b>Shaping hypertext in news: multimedia infographics</b> .....	27
Rafael Cores Fernández-Ladreda (University of Navarra) (Spain)	
<b>New trends in content and design at the Spanish cybermedia</b> .....	47
Javier Díaz Noci (UCB), Manuel Gago (USC), Xosé López (USC), Koldo Meso (UBC), Xosé Pereira (USC) and Ramón Salaverría (UN) (Spain)	
<b>Reality TV game shows as new media paradigms</b> .....	63
Jonathan Dovey (University of the West of England) (United Kingdom)	
<b>The adventure of newspapers online. A case study: the Italian women's weekly <i>Donna Moderna</i></b> .....	71
Leopoldina Fortunati (University of Udine) (Italy)	
<b>New Media: Technology and Cultural Form</b> .....	101
Des Freedman (University of London) (United Kingdom)	
<b>A language made out of elusive shadows</b> .....	115
Bruno G. Gallo (Spain)	
<b>Homepage language and interactivity. A comparison between the paper and website editions of four Belgian newspapers</b> .....	119
Marc Lits (Université Catholique de Louvain) (Belgium)	
<b>eCommunication: the 10 paradigms of media in the digital age</b> .....	129
José Luis Orihuela (University of Navarra) (Spain)	
<b>Elements of digital storytelling: a taxonomy of terms-and a lot of questions..</b>	137
Nora Paul and Christina L. Fiebich (University of Minnesota) (United States)	
<b>Online mass media and asylum politics. New media formats, new politics? ...</b>	151
Eugenia Siapera (University of Amsterdam) (The Netherlands)	
<b>The cyberverbal. On the Internet textuality</b> .....	161
Janez Strehovec (University of Ljubljana) (Slovenia)	

### PART II PRODUCERS

<b>Media organisation and their attitudes towards the Internet-based journalistic applications</b> .....	175
Aukse Balcytiene (Vytautas Magnus University) (Lithuania)	

<b>Multimedia Journalism: exploring the emergence of professional identity in converging newsrooms</b> .....	183
Mark Deuze (ASCoR, Universiteit van Amsterdam) (The Netherlands)	
<b>Things to consider. Speculations on the sociology of online news</b> .....	199
Edgardo Pablo García (University of Westminster) (United Kingdom)	
<b>Journalistic ethics in the age of the Net. Outlining an approach for studying journalists' changing professional identity</b> .....	213
Ari Heinonen (University of Tampere) (Finland)	
<b>The old Media in cyberspace: journalists' perceptions of a difficult transition</b> .....	225
Nikos Leandros (Panteion University) (Greece)	
<b>Production criteria of interactive television programmes: a research proposal</b> .....	233
José Alberto García Avilés, Bienvenido León, Patricia Lafuente (University of Navarra) (Spain)	
<b>The Internet: new challenges, old solutions</b> .....	251
Germán Llorca Abad (University of Valencia) (Spain)	
<b>CRM implementation and repercussion in the communication manager figure</b> .....	259
Inmaculada José Martínez Martínez (University of Murcia) (Spain)	
<b>Journalists' problems with the use of the internet in newsroom: some hints about new training needs for journalists</b> .....	271
Pere Masip (Ramon Llull University) (Spain)	
<b>Consumer product development models in online newspapers. A case study of FT.com and NYTimes.com</b> .....	283
Elizabeth A. Osder (University of Southern California) (United States)	
<b>How Spanish journalists use Internet in daily newsrooms?</b> .....	303
María Bella Palomo Torres (University of Málaga) (Spain)	
<b>e-Communicator</b> .....	311
Sandra Pereira (Escola Superior de Comunicação Social) (Portugal)	
<b>Use of Internet as source in the classic sections of the newspaper</b> .....	323
Teresa Sandoval and Carlos Elías (Universidad Carlos III de Madrid) (Spain)	
<b>Telecoms and democracy online: the relationship between participation and Broadband networks</b> .....	331
Tanja Storsul (University of Oslo) (Norway)	

### PART III ORGANISATIONS

<b>What's behind new business models?</b> .....	345
Michael Ahrens, Markus Krummenerl, Matthias Muenstermann and Helmut Schneider (Centrum für interaktives Marketing und Medienmanagement, Westfälische Wilhelms-Universität Münster) (Germany)	
<b>News companies in the future Five Swedish media companies contemplate the Threats and opportunities of the future</b> .....	365
Börje Alström and Lowe Hedman (Mid-Sweden University, Sundsvall) (Sweden)	

<b>Structure of online media companies</b> .....	379
Nereida Cea and Alejandro Barranquero (University of Malaga) (Spain)	
<b>Mapping online news in Catalonia: old and new media producers</b> .....	397
David Domingo (Universitat Rovira I Virgili) (Spain)	
<b>Technology Transfer and US International Broadcasting: Technology Transfer at the VOA</b> .....	411
Kenneth R. Donow, Ph.D. (Broadcasting Board of Governors, IBB Office of Research) (USA)	
<b>Universities and students as the new content providers. An overview to the "Onda Universitaria" case</b> .....	421
Aurora García González and Lorena Tenreiro Blanco (University of Vigo) (Spain)	
<b>Magazine and newspaper strategic profiles and the new media a diagnostic approach</b> .....	431
Mikko Grönlund and Timo Einari Toivonen (Turku School of Economics and Business Administration) (Finland)	
<b>Old questions need new answers: what is "journalism" in the Internet er?....</b> .....	441
Halliki Harro-Loit (University of Tartu) (Estonia)	
<b>Innovation of the Business Model of Local and Regional Newspapers in Germani. Strategic Discussion of a "Communal Web Service" Model</b> .....	447
Gerd G. Kopper (University of Dortmund) (Germany)	
<b>Creativity and leadership in media firms: what went wrong when the Internet arrived?</b> .....	463
Lucy Küng (University of St Gallen) (Switzerland)	
<b>elections@psb.org: How public broadcasters use their websites in times of elections</b> .....	481
Steve Paulussen and Tomas Coppens (Ghent University) (Belgium)	
<b>Internet becoming mainstream: new trends for consumers and brands</b> .....	511
Francisco J. Pérez-Latre (University of Navarra) (Spain)	
<b>Economics and Content of Web Portals: a Case Study of Yahoo!</b> .....	519
Robert G. Picard (Turku School of Economics and Business Administration) (Finland)	
<b>The challenges of Internet media to traditional media system in Bulgaria</b> .....	531
Lilia Raycheva (The St. Kliment Ohridsky Sofia University) (Bulgaria)	
<b>The creative culture of new media businesses</b> .....	545
Paul Rixon (University of Surrey Roehampton) (United Kingdom)	
<b>Measuring the economic effects of copyright</b> .....	557
Ruth Towse (Erasmus University) (The Netherlands)	
<b>Can diversity be a profit-maximising media strategy? The apparent incompatibility of de-regulation policies, media concentration and audience access to range of choice</b> .....	571
Roger Wallis and Anders Edström-Frejman (Royal Institute of Technology KTH) (Sweden)	

**PART IV  
ORGANISATIONS**

<b>Users' practices of web navigation (or, does a web generation really exist)....</b>	587
Fausto Colombo (Osservatorio sulla Comunicazione Università Católica di Milano (Italy))	
<b>Internet Cafés in Greece. Uses and Gratifications .....</b>	597
Sophia Kaitatzi-Whitlock (Aristotle University of Thessaloniki) (Greece)	
<b>Participants, Consumers and the Politics of Design: British Information Providers on the Web reconfigure the Audience.....</b>	619
Ann Light (University of Sussex) (United Kingdom)	
<b>Internet, e-communication and public opinion: anti-war movement in the Internet and from the Internet in Spain .....</b>	635
Guillermo López García (University Valencia) (Spain)	
<b>Defining mass audiences on new media .....</b>	647
Phil MacGregor (Bournemouth University) (United Kingdom)	
<b>Measuring the Spanish Blogosphere .....</b>	657
Juan J. Merelo, Fernando Tricas, Víctor Ruiz (University of Granada, University of Zaragoza, Blogalia.com) (Spain)	
<b>Building critical trust. An experiment in telephone and broadcasting convergence .....</b>	667
Lars Nyre (University of Bergen) (Norway)	
<b>The Internet in academia: a moment of poise before new cultural reflexivities?</b>	681
Nayia Roussou (Intercollege) (Cyprus)	
<b>Internet and audiences. Are we building correctly the new advertising medium?.....</b>	701
Charo Sádaba, Idoia Portilla and Javier Díaz Noci (University of Navarra, University of Basque Country) (Spain)	
<b>Forming of a new Dimension of the Public Sphere in the People's Republic of China?: A Case Study of the Patriotism Forum of <a href="http://www.people.com.cn">www.people.com.cn</a> .....</b>	723
Yan Wu (Cardiff University) (United Kingdom)	
<b>Effects of Internet use on social cohesion in the Netherlands .....</b>	751
Liesbet van Zoonen, Rita Walczuch, Chris Aalberts, Anne Fjelsten (University of Amsterdam, University Maastricht) (The Netherlands)	

**PART V  
EUROPEAN COMPARATIVE CONTENT ANALYSIS OF ONLINE  
NEWS SERVICES**

<b>Presentation .....</b>	767
<b>Same old news? Properties of print and web news media in Ireland.....</b>	769
John O'Sullivan (Dublin City University) (Ireland)	

<b>Off and On-line newspapers in Italy .....</b>	797
Leopoldina Fortunati and Mauro Sarrica (University of Udine, University of Padova) (Italy)	
<b>Online news media in Portugal: how Portuguese online media are Building brands .....</b>	823
Gustavo Cardoso, Pedro Pereira Neto and Joana Azevedo (ISCTE) (Portugal)	
<b>Aspects of cyber-textuality: interactivity and hypertextuality of online media .....</b>	847
Tanja Oblak (University of Ljubljana) (Slovenia)	
<b>Online news services in The Netherlands.....</b>	865
Richard van der Wurff, Edmund Lauf and Bram Lancee (University of Amsterdam) (The Netherlands)	

# Internet becoming mainstream: new trends for consumers and brands

Francisco J. Pérez-Latre

University of Navarra (Spain)

## 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 I). 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<sup>1</sup>. 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 —

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<sup>1</sup> 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<sup>2</sup>.

**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%
<b>World Total</b>	<b>407.1 million</b>	<b>100</b>

Source: NUA Internet Surveys, [www.nua.net](http://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%
<b>World Total</b>	<b>605.2 million</b>	<b>100</b>

Source: NUA Internet Surveys, [www.nua.net](http://www.nua.net)

<sup>2</sup> "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**

Country	% of Population using the Internet
Sweden	67,8
Denmark	62,7
The Netherlands	60,8
Hong Kong	59,5
Norway	59,2
United States	59,1
United Kingdom	57,2
Australia	54,5
South Korea	53,8
Canada	52,7
Switzerland	52,7
New Zealand	52,7
Finland	51,8
Singapore	51,8
Taiwan	51,8

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<sup>3</sup>. 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.

<sup>3</sup> See [http://www.nua.ie/surveys/how\\_many\\_online](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<sup>4</sup>. 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<sup>5</sup>. Needless to say, Internet is one of the new players. In the new order of marketing, traditional media advertising will play a smaller role<sup>6</sup>.

## 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"<sup>7</sup>.

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<sup>8</sup>. 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-

<sup>4</sup> "Forecaster sees 2003 with 6% advertising growth", *Advertising Age*, November 25, 2002, 1 and 2.

<sup>5</sup> "GM shows way toward new mix", Editorial, *Advertising Age*, January 20, 2003, 20.

<sup>6</sup> Cardona, Mercedes M. "Big guns predict smaller ad role", *Advertising Age*, July 1, 2002, 1, 19.

<sup>7</sup> "Hard times can't dull Net's future", Editorial, *Advertising Age*, June 3, 2002, 16.

<sup>8</sup> *Advertising Age*, October 22, 2001.



dergoing 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 now 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"<sup>9</sup>. "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)<sup>10</sup>.

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).

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<sup>9</sup> "Staying basic", *Advertising Age*, October 8, 2001.

<sup>10</sup> *Advertising Age*, April 8, 2002.

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